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User Manual

v7.1

RelayFax - Network Fax Manager
User Manual

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v7.1.0 - April 2014

Table of Contents

Section I Introduction 8

1 Introduction 8
2 Installation 12

Section II RelayFax's Main Display 16

1 RelayFax's Main Display 16
2 Menu Bar 17
3 Toolbar 18
4 Tool Window 19
5 Log Window 20
Shortcut Menu 21
6 Rescan Ports 23
7 Add Modem 24
8 Modem Properties 27
Fax Device 27
Modem Profile 30
SIP Account 32
Options 34
Dialing 36
Log 37

Section III RelayFax Properties 40

1 RelayFax Properties 40
2 Fax Server 41
Banner Text & Formatting Characters 42
3 Mail Server 44
4 Client Updates 46
5 Options 48
6 Service 51
7 Logs and Contacts 53
8 Select Printer 55
Select Printer 55
Options 56
Network Resource Access 57

Section IV MDaemon SMTP/POP3 Server 60

1 MDaemon Server Settings 60

Section V Faxing Options & Exporting 62

1 Attachment Faxing 62

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2 Exporting 65
Export File Format 67
3 Imaging Options 71
4 OCR Options 73
5 Text Options 76
6 TWAIN Device Support 77

Section VI Mail Sources and Rules 80
1 Mail Sources & Rules dialog 80
2 Calling Number Display (CND) Fax Routing 80
3 Mail Sources 82
4 Default Rules 84
5 Outbound Fax Rules 86
6 Inbound Fax Rules 92
7 Junk Faxes 96

Section VII Event Scheduler 98
1 Event Scheduler 98

Section VIII Dialup Settings 102
1 Dialup Settings 102

Section IX Cover Pages 106
1 Cover Pages 106

Section X Contact Manager 110
1 Contact Manager 110

Section XI Account Settings 112
1 Accounts 112
2 Options/Password 114

Section XII Templates and Billing Codes 118
1 Fax Templates 118
Fax Templates 118
Template Properties 120
Description 120
Defaults 121
Options 123
2 Billing Codes 125

Section XIII RelayFax SMTP Client 128
1 Introduction 128

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2 Using the RelayFax SMTP Client 129
3 Properties Dialog 132
Personal Settings 132
Server Settings 134
Dialup Settings 135
Client Settings 137
Scanner Settings 139
Contact List 140
4 Compose Fax Dialog 141
Compose Fax Dialog 141
Properties 142
Cover Pages 145
Send Schedule 149
Scan Image 150
Scanning Options 151
Attached Documents 153
Advanced Options 154
Error Message 155
5 Working with Faxes 156
RelayFax Printer Driver 156
Viewing, Printing, and Editing Faxes 157
Sending a Fax via an Email Client 158
Sending a Fax via an Email Client 158
Attaching Documents to Fax Messages 159
Email Macros 159
Banner Text & Formatting Characters 164
Advanced Features 166
Sending Faxes Programmatically 166
Using the Broadcast Fax Wizard 167
ODBC Selector Wizard 172

Section XIV Fax Broadcasting 178
1 Using the Broadcast Fax Wizard 178
2 ODBC Selector Wizard 185
3 Canceling a Broadcast Fax 189
4 Pausing a Broadcast Fax 190

Section XV RelayFax Macros 192
1 Email Macros 192
2 Outbound Fax Rule Macros 197
3 DAT File Processing Macros 198
4 RelayFax Data Files 204

Index 209

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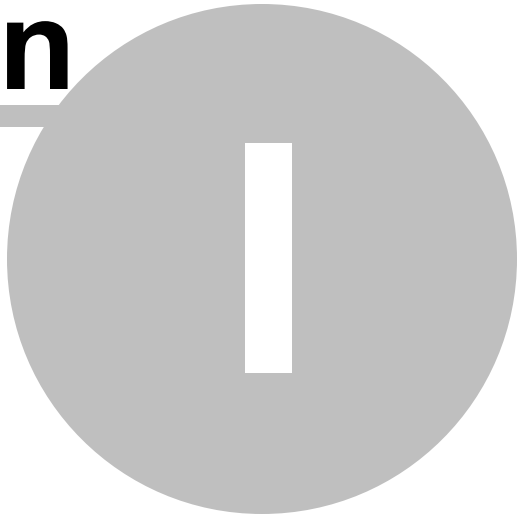
Section



1 Introduction

1.1 Introduction

RelayFax®
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RelayFax is a powerful network fax manager that automates sending, receiving and managing faxes for your users, and that integrates full faxing capabilities directly into your existing email system. RelayFax will monitor any number of POP accessible mailboxes on one or more mail servers, connect to those servers at scheduled intervals, collect all waiting email messages it finds, and then fax, email, or print them based upon a user defined set of fax rules. RelayFax can also dial your Internet Service Provider (ISP) to collect mail periodically instead of being forced to remain online continuously.

Printer drivers for Windows enable you to print directly from any Windows application and have the resulting document faxed to anyone anywhere. The RelayFax SMTP Client component enables you to print from a Windows application at home or on the road and have the resulting document faxed from your RelayFax server at the office. Full drag and drop support also makes it possible for you to fax a document by simply dragging it onto the tray icon or open client dialog.

RelayFax also contains support for TWAIN devices such as digital cameras and scanners. With RelayFax's one-touch scanning features, documents can be scanned and faxed as easily as from a typical fax machine. In addition, scanner support in the client provides this same functionality to both local and remote users.

Faxing from remote and local locations is not limited to just users of the RelayFax SMTP Client — users can also use their favorite email client to send faxes. By including special macros in their messages and then sending them to RelayFax's email address, they can emulate the client's functionality. Documents and other files attached to email messages can also be extracted automatically by RelayFax, converted to a faxable image format, and faxed immediately.

RelayFax is also equipped with the latest Optical Character Recognition (OCR) technology. OCR makes it possible for RelayFax to "read" incoming faxes and route them

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based upon their contents. Faxes can be searched for specific names and phrases and then compared to special Fax Rules that determine what action should be taken when a rule is matched. Further, OCR files can be saved in a large number of the most common document formats. This makes it possible for you to instantly convert a fax to an editable and usable format instead of it simply remaining a static document.

Through the application of administrator-defined Inbound and Outbound Fax Rules, delivering fax and email messages to their proper recipients has never been easier. Users need not even know the fax number of the recipient—outbound messages can be delivered to their correct destination by several alternative routing methods defined in the Outbound Fax Rules. Inbound Fax Rules can also be created that will cause incoming faxes to be delivered to specific locations and users. OCR routing and the sending fax device's Fax ID can be compared to the rules to determine the fax's destination. Finally, there are several other actions made possible by the Fax Rules such as: automatic printing to specific printers, assigning alternate cover pages, attaching Fax Templates which provide various functions, and others. Even fax broadcasting, which sends the same fax to multiple different numbers, is supported by the RelayFax rules system.

RelayFax Feature Summary

- Automatic extraction and faxing of documents attached to email messages sent to the server.
- Check any number of POP mailboxes on any number of mail servers for new mail to be faxed.
- Complete RAS/DUN dial-up support for collecting mail from servers on the Internet.
- Fully schedulable mail collection capabilities.
- Easy integration with MDaemon Email Server and WorldClient 60.
- Automatic detection and use of all fax modems available to the server.
- Support for individually configuring each available modem for sending and receiving faxes.
- Runs as a Windows service.
- Elaborate rules based outbound faxing, which provides the ability to fax or email a message to one or more recipients, fax a message without knowing the fax number, attach an alternate cover page, and much more.
- Fax Broadcasting capability.
- Integrated support for the Microsoft™ Cover Page Editor.
- Least-cost routing support using SMTP sends some mail to other servers over the Internet for faxing.
- Rules based inbound fax routing using the ID of the sending fax device. This makes it possible to route faxes to specific users or printers.
- Automatic printing of inbound and outbound faxes.
- Printer drivers for Windows supports printing to RelayFax from any application.

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- Fax client software sends output from printer driver to RelayFax's mail server account for pickup.
- Shared network-wide fax contacts and address book capability.

Sending Faxes

You can send a fax by using any of the following methods:

- Drag a document onto the RelayFax SMTP Client's 128 tray icon, or onto an open Client dialog.
- Send an email message to RelayFax's designated email address and place the recipient's fax number anywhere in the message's TO: line.
- Send an email message to RelayFax's designated email address and let the Fax Rules 86 system determine where to fax it.
- Print to the RelayFax Printer Driver 156 from any Windows application.
- Send only a cover page with a brief message on it through a single click of the RelayFax SMTP Client.

Receiving Faxes

RelayFax detects and enable all of your fax modems when it is started. In addition, you can selectively configure modems that you may wish to use only for inbound or outbound faxing.

When a fax is received the transmitting fax device's Caller Sender Identification (CSID) is compared to your Inbound Fax Rules. Then, the fax is folded into an email message using MIME techniques and is sent to any number of recipients determined by the Fax Rules, or to a default address if no rules are applied. Incoming faxes can also be routed based upon the COM port of the receiving modem, and upon the results of optical character recognition (OCR). Rules can be set up to search for specific words or phrases in the faxed document and then routed based on the results of the search.

New in RelayFax 7.1

Special Considerations

- The product registration system has been updated to utilize a digitally signed XML based license file. This approach allows for greater flexibility, and it will enable Alt-N Technologies to offer new innovative purchasing and renewal options. The installation process will automatically download the license file. Product activation has been replaced by a scheduled mechanism that will update the license file on a periodic basis. The system is able to accommodate temporary connectivity outages, however communication with the licensing service is required for continued use of the product.

Changes and Additional Features

- Updated Black Ice printer drivers to 13.77.
- The printer driver version in now shown in Help|About.
- Updated data collection in installer.

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- Updated Brooktrout SDK to 6.6
- Export csv file now contains column names
- All fields in export csv file are now quoted
- For a complete list of all changes and fixes included in RelayFax 7.1, see `RelNotes.html` located in the `\RelayFax\Docs\` subfolder.

New in RelayFax 7.0

- **Redesigned Interface** - The entire graphical user interface (GUI) has been completely redesigned and modernized in both RelayFax and the RelayFax SMTP Client.
- **T.38 Over IP** - RelayFax now supports up to 30 virtual fax devices that can login to a Session Initiation Protocol (SIP) based software PBX (private branch exchange). For more information, see the Add Modem 24 dialog and the new SIP Account 32 pane.
- **Activation** - RelayFax now requires registration key activation. The goal of the activation system is to combat piracy and protect the interests of legitimate customers. Activation verifies that the key you are using is legitimate, and it ties your registration information to the computer on which RelayFax is installed, making it difficult for others to illegally use your registration key.

  An activation wizard is available which will walk you through the simple process of activating your registration key. You can activate automatically or manually, and the process takes only a few seconds. No personal information about you is required or transmitted, and no reactivation is required unless you replace your computer's network card. If you should need to reactivate RelayFax in the future, the activation wizard is located under the "Help » Activate your Alt-N software" menu selection. Registered users have 30 days in which to activate before RelayFax will stop functioning.

  For more on activation, visit: http://www.altn.com/Activation/faq.asp
- **Improved Context-sensitive Help** - The user help has been redesigned and expanded in both RelayFax and the RelayFax SMTP Client. Additionally, virtually all dialogs and panes have a Help button that is context sensitive. Click *Help* anywhere in RelayFax or in the RelayFax SMTP Client to open the user help to the related section.

See also:

Installation 12
RelayFax's Main Display 16
RelayFax SMTP Client 128

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1.2 Installation

System Requirements

These are the minimum recommended system requirements for RelayFax to run. This does not take into account running multiple applications simultaneously. To run several applications at the same time, your computer should exceed these recommendations.

- Microsoft Windows OS
  - Windows XP (32-bit and 64-bit)
  - Windows Server 2003 (32-bit and 64-bit)
  - Vista (32-bit and 64-bit) (excluding Vista Home Edition)
  - Windows Server 2008, Windows 2008 R2 (32-bit and 64-bit)
  - Windows 7 (32-bit and 64-bit)
  - Windows Server 2012 (32-bit and 64-bit)
  - Windows 8 (32-bit and 64-bit)
- CPU 1GHz (or higher) processor.
- 512 MB of memory (1GB recommended).
- Minimum hard disk space required: 100 MB of free space, plus space for logs and saved faxes (30 MB for RelayFax SMTP Client).
- TCP/IP network protocol installed.
- Internet or Intranet communication capabilities.
- Access to a standard SMTP/POP3 Email server. This server does not need to be installed on your LAN. RelayFax's Internet and dialup features make it possible to use your ISP's mail server, or any other server that you are allowed to use for collecting and sending email.

Although not required, RelayFax can be run concurrently with your mail server on the same computer. In fact, if you are using MDaemon Email Server 60 then this is recommended in order to utilize its built-in integration features more effectively.

- One or more fax boards or class 1, 1.0, 2, 2.0, or 2.1 fax modems, or a T.38 compatible VOIP gateway (when using Fax-over-IP) to convert T.38 packets to audio for transmission to a conventional fax machine. Not required for the RelayFax SMTP Client.

Before You Begin

RelayFax's installation program will ask you a number of questions during the installation process that are required to properly configure your server. While it is possible to enter some of this information after installation, you can save time and end your installation with a fully configured server by knowing the answers to these questions before you begin.

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You will need to know:

- The drive and directory in which you wish to install RelayFax (the default is C:\Program Files\RelayFax).
- The registered user's name and company.
- Which components you wish to install at this time. You can choose to install: the RelayFax server application and support files, the RelayFax SMTP Fax Client, the printer drivers, and the OCR Printer Driver.

Server

You will need to know:

- Your Company name.
- The Call Subscriber Identification (CSID) that you wish to assign to your fax device (this is usually the same as your company name). In some areas of the world this information is required.
- Your fax and voice numbers.
- The domain name or IP address of your mail server.
- The logon and password for the RelayFax account on your mail server.

Client

You will need to know:

- The domain name or IP address of your mail server
- Your email address
- The email address of the RelayFax mail account.

Optical Character Recognition (OCR)

RelayFax is equipped with Optical Character Recognition (OCR) technology, but to make these features available you must install a separate plug-in module (`rfocr700_xx.exe`). If you have not yet installed it, the options on the OCR Options 73 pane will be unavailable and it will contain a message informing you that it needs to be installed. A link is also provided to the RelayFax web site from which the module can be downloaded.

Brooktrout Boards

If you wish to use a board based on Brooktrout's open BOSTON architecture, RelayFax supports this via Cantata Technology's Brooktrout System Software. To add this functionality to RelayFax v7, install RelayFax and then install `rfbt700_xx.exe` and follow the instructions provided during installation and in the installed `readme.txt` file.

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See Also:

Introduction 8
RelayFax's Main Display 16
RelayFax SMTP Client 128

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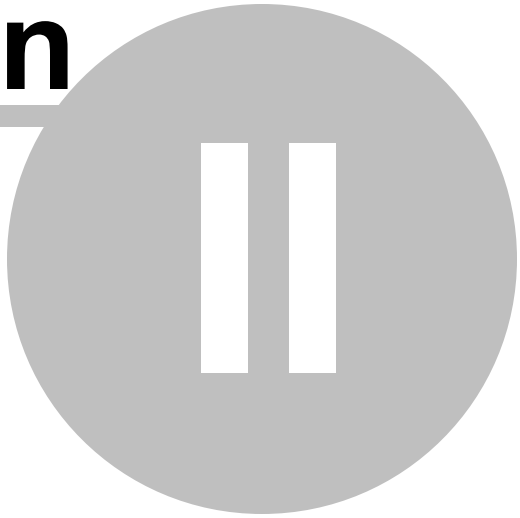
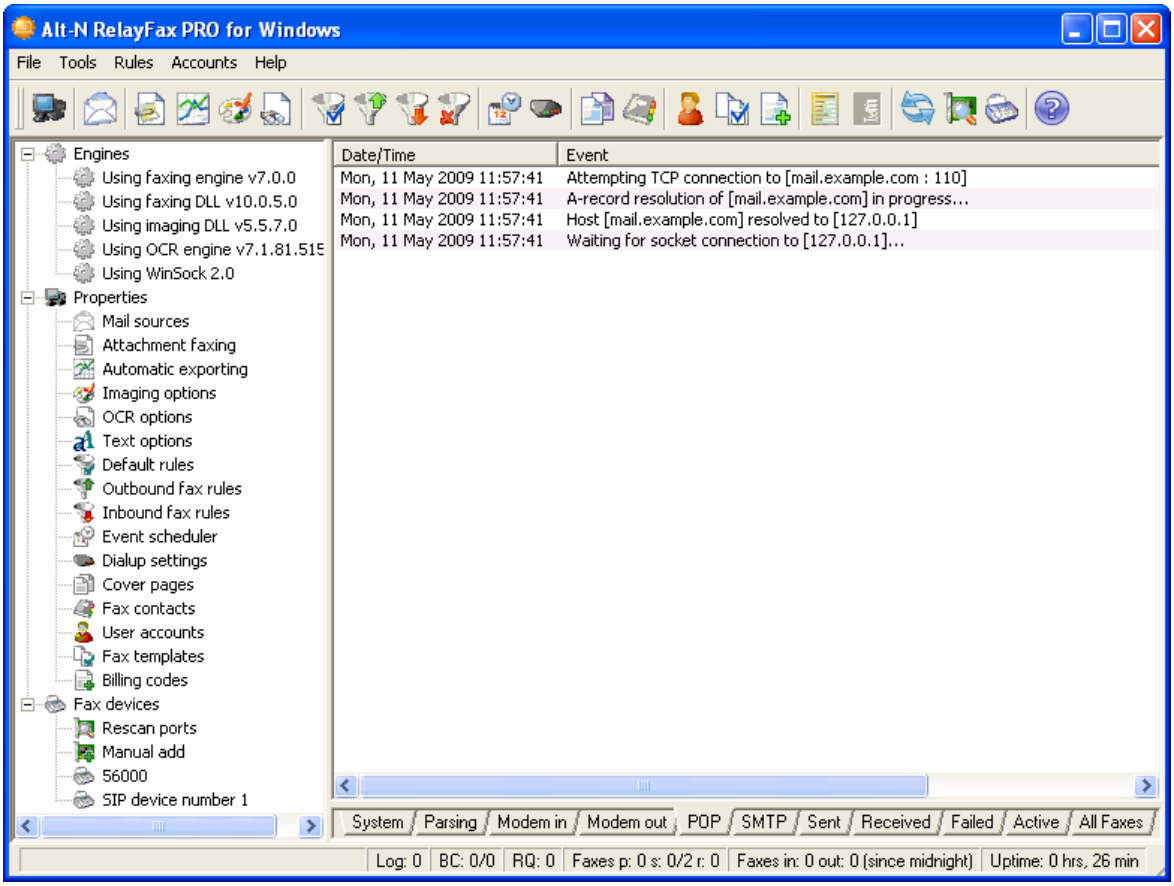
Section



2 RelayFax's Main Display

2.1 RelayFax's Main Display


Alt-N RelayFax PRO for Windows
File Tools Rules Accounts Help
Engines
Using faxing engine v7.0.0
Using faxing DLL v10.0.5.0
Using imaging DLL v5.5.7.0
Using OCR engine v7.1.81.515
Using WinSock 2.0
Properties
Mail sources
Attachment faxing
Automatic exporting
Imaging options
OCR options
Text options
Default rules
Outbound fax rules
Inbound fax rules
Event scheduler
Dialup settings
Cover pages
Fax contacts
User accounts
Fax templates
Billing codes
Fax devices
Rescan ports
Manual add
56000
SIP device number 1
Date/Time
Event
Mon, 11 May 2009 11:57:41 Attempting TCP connection to [mail.example.com : 110]
Mon, 11 May 2009 11:57:41 A-record resolution of [mail.example.com] in progress...
Mon, 11 May 2009 11:57:41 Host [mail.example.com] resolved to [127.0.0.1]
Mon, 11 May 2009 11:57:41 Waiting for socket connection to [127.0.0.1]...
System Parsing Modem in Modem out POP SMTP Sent Received Failed Active All Faxes
Log: 0 BC: 0/0 RQ: 0 Faxes p: 0 s: 0/2 r: 0 Faxes in: 0 out: 0 (since midnight) Uptime: 0 hrs, 26 min

RelayFax's main display provides easy access to all of the server functions, and logs each inbound and outbound fax event. This display consists of several components including: the Menu Bar, Toolbar, Tool Window, Log Window, and the Modem Properties dialog.

Menu Bar 17
Directly beneath the title bar at the top of RelayFax's Main Display is the Menu Bar. The Menu Bar contains two drop-down menus from which you can access the majority of RelayFax's dialogs.

Toolbar 18
RelayFax comes equipped with a movable toolbar that can be used to access most of the program dialogs. The Toolbar can be dragged from its default position beneath the menu bar and redocked to any side of the main display window, or left to float freely on the desktop.

Tool Window 19
The Tool Window contains a tree-view list of RelayFax features and dialogs. Simply

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double-click any listed item to open its corresponding dialog or feature.

Log Window 20
The Log Window displays a continually updated and highly detailed log of all faxing events and POP and SMTP sessions occurring within RelayFax. Several tabs in the Log Window also contain an entry for each inbound and outbound fax that has been sent, received, or is pending. You can right-click any entry to display a Shortcut Menu 21, which is used to perform various actions.

Rescan Ports 23
When this control is clicked RelayFax will attempt to automatically detect all fax devices accessible to the RelayFax Server.

Add Modem 24
Use the Add Modem dialog to manually configuration modems that RelayFax is unable to detect by the Rescan Ports control.

Modem Properties 27
Use the Modem Properties dialog to control several setup and configuration factors of each fax device installed on your system.

See Also:

Introduction 8
RelayFax Properties Dialog 41
Mail Sources & Rules 82
Event Scheduler 98
Dialup Settings 102
RelayFax SMTP Client 128
RelayFax Driver 156

2.2 Menu Bar

Directly beneath the title bar at the top of RelayFax's Main Display is the Menu Bar. The Menu Bar contains several drop-down menus from which you can access the majority of RelayFax's dialogs. Simply click on a menu item to make a desired selection.

Alternatively, you can access most of RelayFax's features and quickly accomplish tasks you perform frequently by using shortcut keys. Shortcut keys are signified by the underlined letter in a menu title, corresponding drop-down list item, or control description in an individual dialog box. To use a keyboard shortcut simply press the ALT key followed by the underlined letter of the desired command. In the case of items on the drop-down list, there is no need to press the ALT key first.

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2.3 Toolbar

RelayFax comes equipped with a movable toolbar that can be used to access most of the program dialogs. The Toolbar can be dragged from its default position beneath the menu bar and docked to any side of the main display window. Alternatively, it can be left in a detached state and it will float freely wherever it is placed on the display window or it can be dragged completely off the display and placed upon the Windows Desktop. To move the Toolbar simply click on it anywhere above or below its buttons and drag it to the desired position. In its free-floating state the RelayFax Toolbar can also be resized by moving the pointer over its edge and then dragging to the desired size.

Position the pointer over any of the Toolbar's buttons and a tool tip will appear telling you its use.

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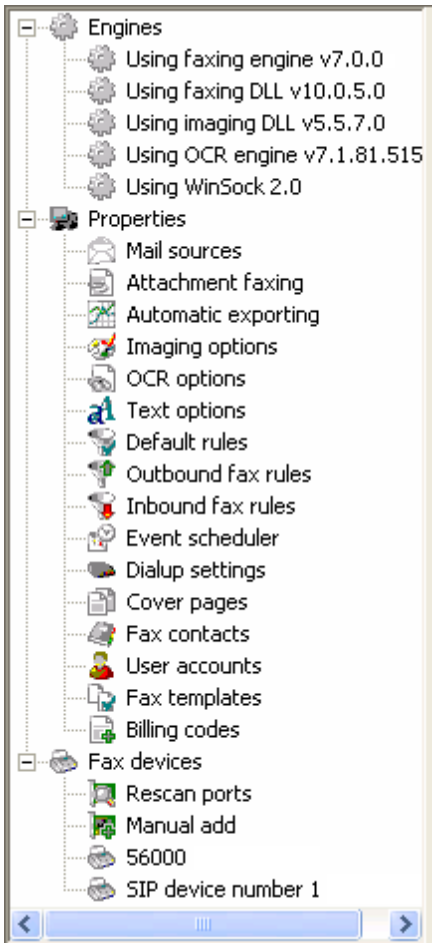
2.4 Tool Window



The Tool Window contains a tree-view list of RelayFax features and dialogs. Double-click any listed item to open its corresponding dialog, or right-click an item and then choose Properties from the shortcut menu. You can collapse or expand each section of the list by clicking on its respective plus or minus sign located to the left of the section's top item.

The Modem Properties 27 dialog and the Add Modem 24 dialog can only be reached through the Tool Window. Double-click on a listed modem to open its Modem Properties dialog. You can also right-click the listed modem to access its properties, reinitialize it, delete it from the list, or reorder its position in the list (pending faxes are assigned to available fax devices in the order in which they appear in the list). If no modems are listed you may need to click the Rescan Ports button first to detect and list your installed modems. You can manually add modems that may not be listed by double-clicking the Manual Add icon and using the Add Modem dialog that will be opened.

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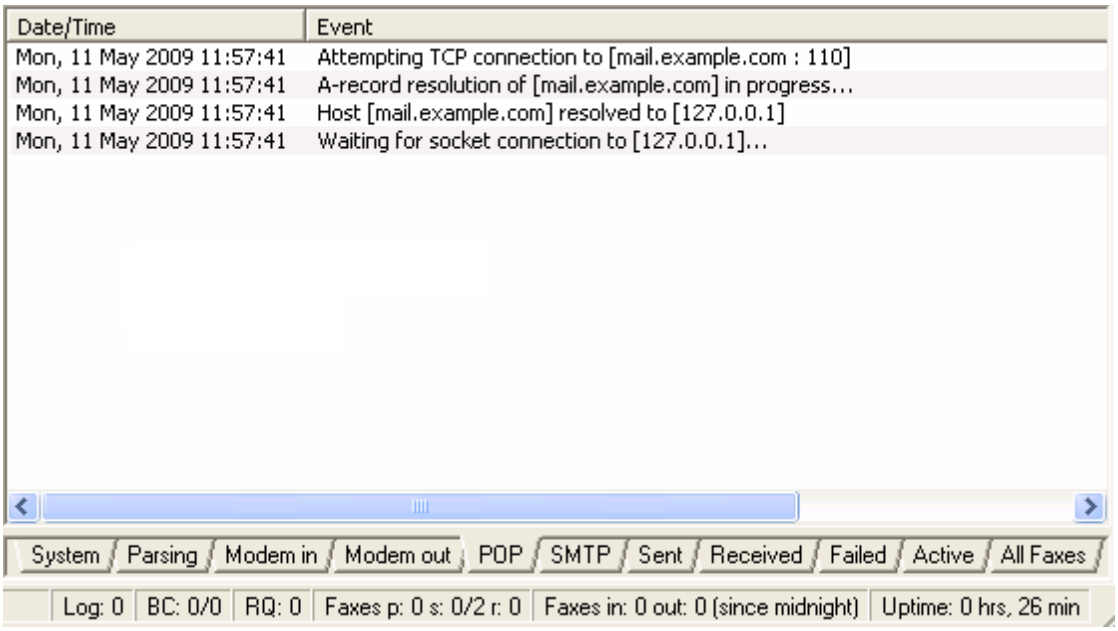
2.5 Log Window



The largest pane in RelayFax's main display is the Log Window, which displays a continually updated and highly detailed log of all faxing events and POP and SMTP sessions occurring within RelayFax. This feature makes it possible to quickly reference any information regarding RelayFax's recent activities about which you may have questions. It will also alert you to errors and problems that may occur during processing, thus aiding in diagnosing possible problems. The Log Window contains multiple tabs — use the tabs at the bottom to select which specific category of details you would like to view.

Entries for each inbound and outbound fax processed is included on several tabs: Sent, Received, Failed, Active, and All Faxes. The sender and recipient of the fax is listed as well as the time and date of the fax, the fax device's ID, the status of each fax (e.g. Pending, Sending, Received, or Sent), and a number of other facts.

The status bar directly below the Log Window shows what the server is currently doing. It lists the number of entries present in the fax log, and the number of messages in the remote queue waiting to be uploaded to the mail server. It also displays the number of faxes currently pending (p:), being sent (s:), and being received (r:). The two elements of the "s:" counter reflect the number of faxes in progress (the number to the left of the slash) and the total number of modems available to send faxes (the number to the right of the slash). The rest of the status bar shows the number of faxes that have been received and transmitted since midnight and the total amount of time the server has been running since it was last started.

For each fax entry there is also a Shortcut Menu 21 that can be used to perform various actions. The Shortcut Menu can be reached by right clicking any entry. The menu's controls will apply to any faxes selected in the window.

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The number of pending faxes that will be displayed in this window is determined by the "MaxPendingFaxCount=" switch in the "[FaxServer]" section of the RelayFax.ini file. The default setting for this switch is "10". If you have configured RelayFax to use multiple modems then you may wish to increase this value by 5-10 for each modem being used. In other words: 10 for one modem, 15-20 for two, and so on.

See:

Shortcut Menu 21

2.5.1 Shortcut Menu

For the fax-related tabs in the Log Window 20, there is a shortcut menu that controls a number of tasks and features that can be applied to the entries on those tabs. To use the shortcut menu, right-click an entry and then click any available option that you wish to use. To select multiple entries, hold the Ctrl key down while clicking the desired entries and then right-click on any of those selected entries to bring up the shortcut menu. The menu's controls will then apply to all of the selected entries. Note: Some of the shortcut menu's options will not be available when multiple entries are selected.

There are seventeen listed commands on the shortcut menu: Select all, Summary report, Detail report, Export, Send to, Set port, Re-fax, Re-fax to, Prioritize, Delete, Cancel, Add rule, View/edit, Recognize, Print, Properties, and Close.

The **Select All** command will cause all entries to be selected. This makes it possible to Delete or create a report for all entries simultaneously.

Summary report builds a very brief report of all selected entries. It can be saved as a file and printed.

The **Detail report** command builds a highly detailed report of all selected entries, which includes information about the entries and the server activity related to them. This report can be saved as a file and printed. TIP: We suggest that you periodically use the Detail report feature and then delete all entries to maximize your computer's resources.

The **Export** command exports the selected faxes to the export directory in TIF format and creates a comma-delimited export file detailing the information regarding the

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selected faxes. This export file can then be used with any database, spreadsheet, or other product which can import comma-delimited files.

For more information on exporting files and their format, see: Exporting 65 and Export File Format 67.

Send To will email the fax image to the address you specify. You will be prompted for the email address.

Use the **Set port** command to assign a specific port on which to send a pending fax.

The **Re-fax** command will resend a failed or previously sent fax.

The **Re-fax to** command is the same as Re-fax above except that you will be asked which number that you wish to send the fax to, plus you can optionally include different Company and Attention information than that which was in the original fax.

Prioritize opens a dialog from which you can change a pending message's priority setting. Note: you can only modify the Priority setting of faxes with a status of "Pending".

Click **Delete** to cause the selected entry or entries to be removed from the window and from the directory where the fax file is stored. Any fax image or work files that may be taking up disk space will also be deleted. You can also delete entries by selecting them and pressing the DELETE key.

The **Cancel** command is used to cancel faxes that are in progress. Click this option to cancel a fax in progress before deleting it.

The **Add rule** command, when selected on a received fax, will start the rule editor with the remote fax ID as the "match text". This will save time when setting up rules for inbound fax routing.

The **View/edit** command will open the selected fax file for viewing in your default editor.

Click **Recognize** to OCR recognize the selected fax. A dialog will appear on which you can assign a filename and choose the format in which the OCR file will be saved.

Print will print the selected entries. The Select Printer dialog will open first so that you can choose which printer to use.

Click the **Properties** command to open the Fax Status property sheet for the selected fax entry. This sheet lists several facts and statistics about the fax in question. It also

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has a "View" button that can be used to view the fax to which it corresponds. Note: Fax Status property sheets of inbound faxes will be limited in their scope. There is much more information available to RelayFax on outgoing faxes.

Click the **Close** command to close the shortcut menu without executing any other shortcut commands.

If you have configured the Imaging Options 71 dialog to *Remove fax images from disk after they are sent* then you will not be able to use some of these options.

2.6 Rescan Ports

Click either the button on the Toolbar or the icon listed under the Fax Devices section of the Tool Window to scan the local COM ports to detect installed modems. RelayFax will attempt to detect automatically all fax devices accessible to the RelayFax Server. Occasionally you may need to rescan your ports after starting RelayFax or in the event of some error. If the server is unable to detect your modem you can use the Add Modem 24 feature to enter your device's information manually.

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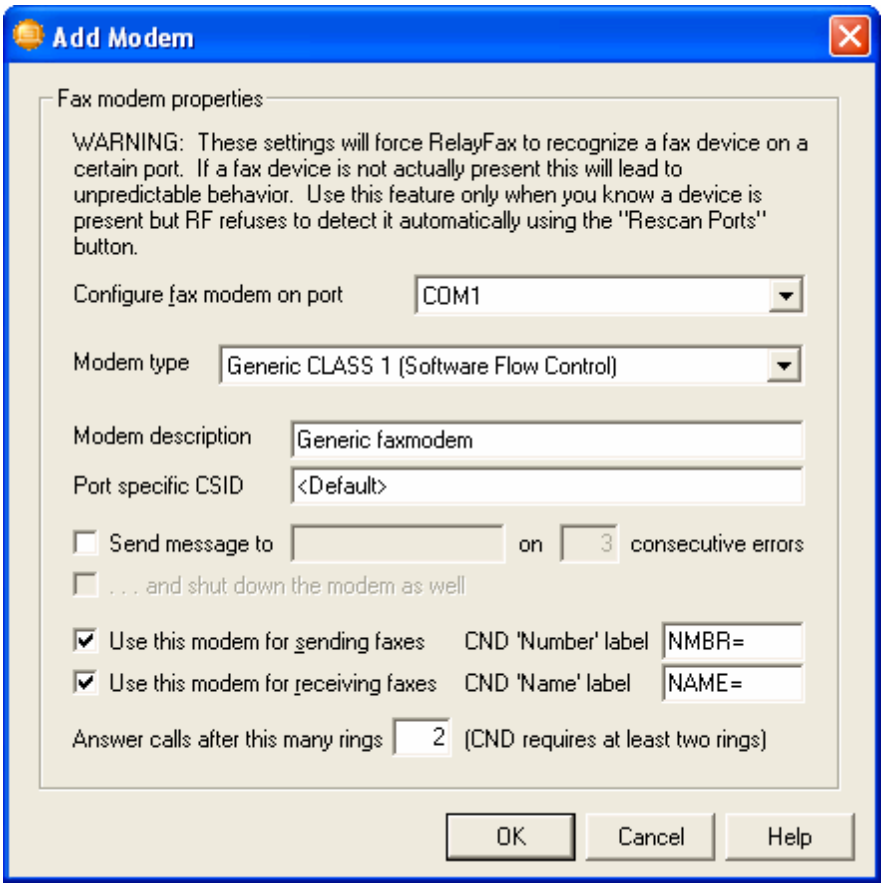
2.7 Add Modem


Add Modem
Fax modem properties
WARNING: These settings will force RelayFax to recognize a fax device on a certain port. If a fax device is not actually present this will lead to unpredictable behavior. Use this feature only when you know a device is present but RF refuses to detect it automatically using the "Rescan Ports" button.
Configure fax modem on port
COM1
Modem type
Generic CLASS 1 (Software Flow Control)
Modem description
Generic faxmodem
Port specific CSID
<Default>
Send message to
on
3
consecutive errors
. . . and shut down the modem as well
Use this modem for sending faxes
CND 'Number' label
NMBR=
Use this modem for receiving faxes
CND 'Name' label
NAME=
Answer calls after this many rings
2
(CND requires at least two rings)
OK
Cancel
Help

Use the Add Modem dialog to manually configure modems that RelayFax is unable to detect by the Rescan Ports control. After manually creating an entry for a modem, you can configure it normally from the Modem Properties dialog 27.

The Add Modem dialog can only be reached through the Tool Window 19. Under the Fax Devices section of the Tool Window, double-click the Manual Add icon, or right-click the icon and then click Properties on the shortcut menu.

Fax Modem Properties

Configure fax modem on port

From the drop-down list, select the port on which your device is installed. The available options in this list will change based on the type of device you have selected in the *Modem Type* option below.

Modem Type

Choose a device type from the drop-down list box.

Brooktrout Boards

When choosing *Brooktrout Channel* as your Modem Type, RelayFax supports

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boards based on Brooktrout's open BOSTON architecture via Cantata Technology's Brooktrout System Software. To add this functionality to RelayFax v7, install `rfbt700_xx.exe` and follow the instructions provided during installation and in the installed `readme.txt` file.

T.38 Devices
RelayFax supports up to 30 virtual fax devices that can logon to a SIP-based software PBX. To add a T.38 device, first choose *SIP (T.38) Channel* as your Modem Type. Then configure the other settings on this dialog and click OK. Next, double-click the new device's entry in the Tool Window. This will open the Modem Properties dialog, which contains the SIP Account 32 pane necessary for configuring the device.

Modem Description
Use this text box for listing a small description of the fax modem (e.g. "XYZ modem", "Modem for receiving faxes", and so on). This description will be displayed under the "Fax devices" heading in the Tool Window 19 of the RelayFax interface.

Port specific CSID
Each fax device must have a unique Call Subscriber Identification by which it identifies itself when connecting to other fax devices. It is common practice to use either your company name or fax number as your CSID. Use this option to enter a specific CSID for this modem, or leave it set to <Default> to use the CSID specified elsewhere in RelayFax's settings.

If you enter a specific CSID in this control then it will be used for all incoming and outgoing faxes on this device and override any other CSIDs that you have specified elsewhere (for example, on the Fax Server 41 pane of RelayFax Properties, or on a Fax Template 118). Thus, if you want to assign dynamic CSIDs based on templates and rules then you must leave this option set to <Default>.

Send message to [email address] on XX consecutive errors
Click this option and specify an email address and numerical value if you wish to send a warning message to someone whenever the specified number of connection errors occurs. This can be used for example to notify the administrator that the server is having a problem connecting to other devices and thus alert him that there could be a problem with your modem or phone line.

...and shut down the modem as well
Click this option if you want the modem to be taken offline if the number of connection errors specified in the above control occurs. If you are dividing your fax load across multiple modems then this could be a good way to cause a faulty modem to be shut down automatically and thus transfer the workload to your other modems until you can identify the problem.

Use this modem for sending faxes
Select this option if you wish to use this device to send faxes.

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Use this modem for receiving faxes
Select this option if you wish to use this device to receive faxes.

CND 'Number' label
Enter the label that your modem adds to the Calling Number Display (CND) data corresponding to the caller's fax number (e.g. "NUMB=", "CALLER NUMBER:", and so on). You can identify the label by watching for it in the main display during an incoming call being processed by RelayFax.

CND 'Name' label
Enter the label that your modem adds to the Calling Number Display (CND) data corresponding to the caller's name (e.g. "NAME=", "CALLER NAME:", and so on). You can identify the label by watching for it in the main display during an incoming call being processed by RelayFax.

Answer calls after this many rings [xx] (CND requires at least two rings)
Specify how many times the line must ring before RelayFax will answer it.

When utilizing RelayFax's CND features (i.e. Caller ID), you must specify at least two rings in this control because CND data is transmitted between the first and second ring.

See also

Calling Number Display (Caller ID) Fax Routing

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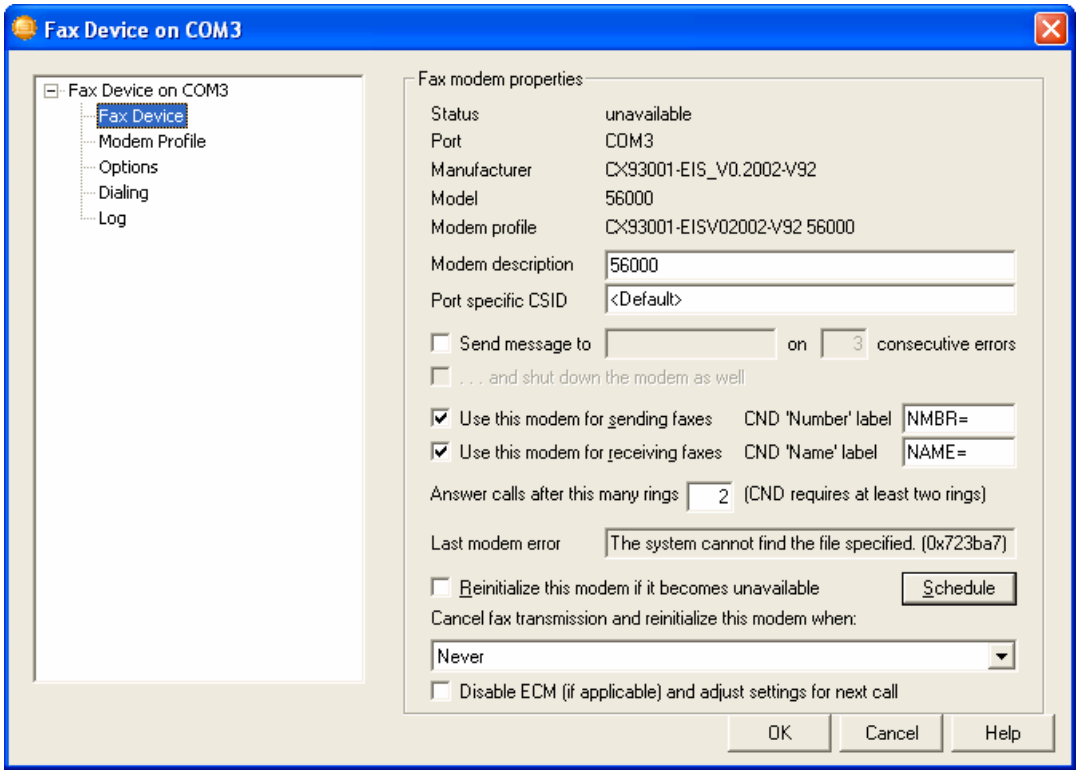
2.8 Modem Properties

2.8.1 Fax Device


Fax Device on COM3
Fax Device on COM3
Fax Device
Modem Profile
Options
Dialing
Log
Fax modem properties
Status unavailable
Port COM3
Manufacturer CX93001-EIS_V0.2002-V92
Model 56000
Modem profile CX93001-EISV02002-V92 56000
Modem description 56000
Port specific CSID <Default>
Send message to on 3 consecutive errors
. . . and shut down the modem as well
Use this modem for sending faxes CND 'Number' label NMBR=
Use this modem for receiving faxes CND 'Name' label NAME=
Answer calls after this many rings 2 (CND requires at least two rings)
Last modem error The system cannot find the file specified. (0x723ba7)
Reinitialize this modem if it becomes unavailable Schedule
Cancel fax transmission and reinitialize this modem when:
Never
Disable ECM (if applicable) and adjust settings for next call
OK
Cancel
Help

The settings for each of your fax devices are configured through the Modem Properties dialog, which can only be reached through the Tool Window 19. Under the Fax Devices section of the Tool Window, double-click on a listed device to open its Modem Properties dialog, or right-click the device and then click Properties on the shortcut menu.

If no devices are listed then you may need to click the Rescan Ports button first in order for RelayFax to detect and list your installed modems. If the modem is still not detected then you can use the Add Modem 24 option to manually add the device.

Fax Modem Properties

The default pane displayed when opening a device's Modem Properties dialog is "Fax Device." The top section of this pane displays information about the fax device, including: its status, the port on which it operates, the manufacturer and model, and the modem profile.

Modem Description

Use this text box for listing a small description of the fax modem (e.g. "XYZ modem", "Modem for receiving faxes", and so on). This description will be displayed under the "Fax devices" heading in the Tool Window of the RelayFax interface.

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Port specific CSID
Each fax device must have a unique Call Subscriber Identification by which it identifies itself when connecting to other fax devices. It is common practice to use either your company name or fax number as your CSID. Use this option to enter a specific CSID for this modem, or leave it set to <Default> to use the CSID specified elsewhere in RelayFax's settings.

If you enter a specific CSID in this control then it will be used for all incoming and outgoing faxes on this device and override any other CSIDs that you have specified elsewhere (for example, on the Fax Server 41 pane of RelayFax Properties, or on a Fax Template 118). Thus, if you want to assign dynamic CSIDs based on templates and rules then you must leave this option set to <Default>.

Send message to [email address] on XX consecutive errors
Click this option and specify an email address and numerical value if you wish to send a warning message to someone whenever the specified number of connection errors occurs. This can be used for example to notify the administrator that the server is having a problem connecting to other devices and thus alert him that there could be a problem with your modem or phone line.

...and shut down the modem as well
Click this option if you want the modem to be taken offline if the number of connection errors specified in the above control occurs. If you are dividing your fax load across multiple modems then this could be a good way to cause a faulty modem to be shut down automatically and thus transfer the workload to your other modems until you can identify the problem.

Use this modem for sending faxes
Select this option if you wish to use this device to send faxes.

Use this modem for receiving faxes
Select this option if you wish to use this device to receive faxes.

CND 'Number' label
Enter the label that your modem adds to the Calling Number Display (CND) 80 data corresponding to the caller's fax number (e.g. "NUMB=", "CALLER NUMBER:", and so on). You can identify the label by watching for it in the main display during an incoming call being processed by RelayFax.

CND 'Name' label
Enter the label that your modem adds to the Calling Number Display (CND) 80 data corresponding to the caller's name (e.g. "NAME=", "CALLER NAME:", and so on). You can identify the label by watching for it in the main display during an incoming call being processed by RelayFax.

Answer calls after this many rings [xx] (CND requires at least two rings)
Specify how many times the line must ring before RelayFax will answer it.

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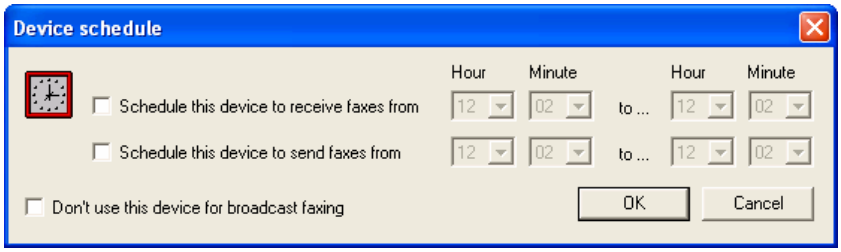
When utilizing RelayFax's CND features (i.e. Caller ID), you must specify at least two rings in this control because CND data is transmitted between the first and second ring.

Last modem error
This information box displays the last error that the device encountered.

Schedule
Click *Schedule* to open the Device Schedule dialog, which can be used to limit the device to sending or receiving faxes during a specific window of time each day. You can specify separate time-periods for both sending and receiving. You can also prevent the device from being used for broadcast faxing 178 by enabling the *Don't use this device for broadcast faxing* option.



Reinitialize this modem if it becomes unavailable
Enable this check box if you want RelayFax to attempt to reinitialize the device whenever it becomes unavailable from some reason.

Cancel fax transmission and reinitialize this modem when:
You can use this option to cause RelayFax to cancel a fax transmission and reinitialize the modem whenever it is taking an excessive amount of time to transmit a page, which could be an indication that there is a problem with the device or that it is locked up. After reinitializing the modem RelayFax will attempt to resend the fax.

Never - Choose this option if you do not wish to set a timeout limit for transmitting a page.

A single page transmission takes more than 60 seconds - Choose this option if you wish to set the timeout value to 60 seconds. If a page cannot be transmitted within 60 seconds then RelayFax will cancel the transmission and reinitialize the device.

Set specific timeout - Choose this option if you wish to set a specific timeout value. You can set the value from 40-120 seconds.

Disable ECM (if applicable) and adjust settings for next call
Check this box if you wish to disable Error Correction Mode for this device and have RelayFax adjust several settings to help the device operate successfully without it. Specifically, the device's send and receive baud rate 34 will be set to 14.4k, the TIFF format will be set to 1D CCITT compression, and if you have enabled the fax transmission timeout above, it will be set to 120 seconds.

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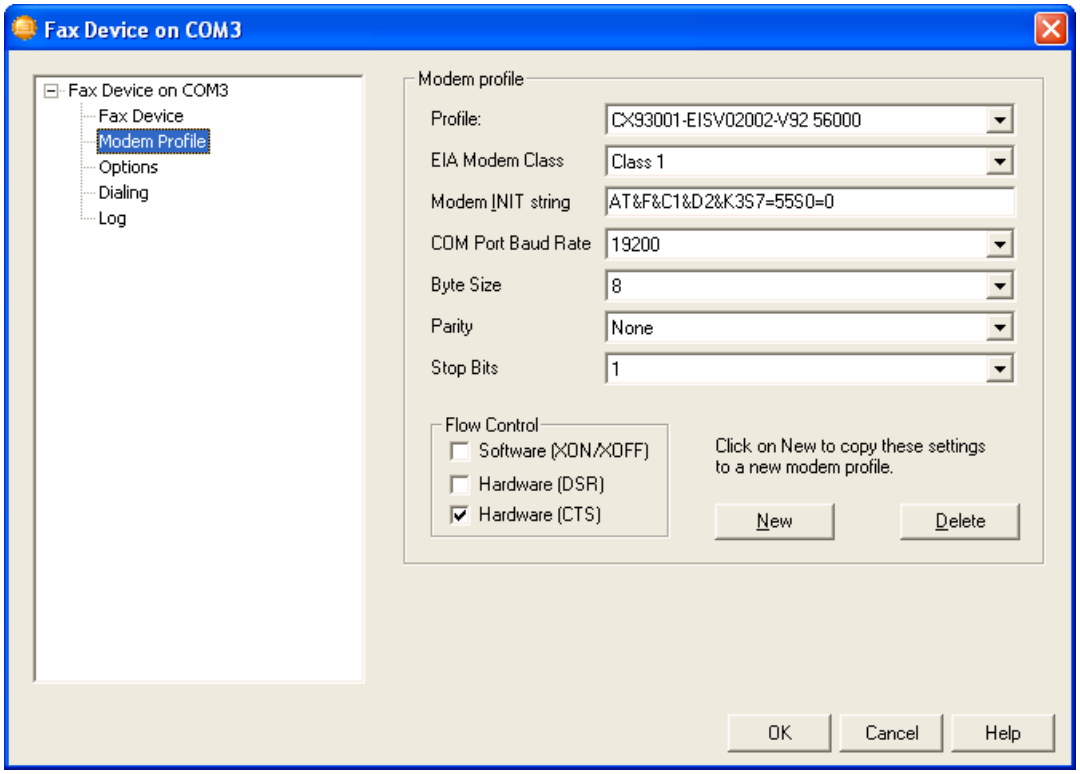
See also

[Calling Number Display (Caller ID) Fax Routing](#) 80
[RelayFax Properties » Options](#) 48

2.8.2 Modem Profile



Profile:
This is your fax device's profile. Choosing a different profile from the drop-down list may change the rest of the settings on this dialog. If the rest of the settings are dimmed or unavailable and you wish to edit them, click the New button to copy the settings to a new profile that you can edit.

EIA Modem CLASS
This control specifies the EIA modem standard that the device supports.

Modem INIT String...
Your modem's initialization string is specified here. Normally, this string is detected when the fax device is queried by RelayFax. Changing your fax device's profile may also alter the INIT string.

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Although RelayFax will allow you to edit the INIT value, do so with caution. Improper changes to modem INIT strings can cause your modem to stop working properly. See your modem documentation for more information on initialization strings.

COM Port Baud Rate
This is the maximum rate in bits per second (bps) that RelayFax may communicate with the fax device. This is not the rate at which the fax device communicates with other fax devices. That rate is specified on the Options 34 pane.

Byte Size
This is the number of data bits used for each character that is transmitted and received by the modem. This setting must match the same setting in the modem with which you are communicating. Most fax devices use a value of 8, so you should not change it to another value unless you are certain it's necessary.

Parity
Parity is a method of error correction. With parity correction enabled, an extra bit is transmitted with each character in order to make the number of bits sent either Odd or Even. There are also Mark and Space settings, which cause the parity bit to be either always set or always cleared, respectively. Both modems, whether sending or receiving, must have the same parity setting—it should typically be set to None because most connections use more sophisticated methods of error correction.

Stop Bits
This is the number of stop bits sent to indicate the end of each transmitted character. This is typically set to "1."

Flow Control

Flow Control is a method for compensating for the difference between the speed at which data reaches a device and the speed at which that device can process and transmit it. Because data might be sent faster than it can be processed, flow control can help prevent data from being lost by telling the sending device to pause while it catches up.

Software (XON/XOFF)
Click to enable this software-based method of flow control. This method transmits standard ASCII characters to pause and resume the flow of data. This software-based method is typically inferior to hardware flow control, but not all fax devices are equipped with a hardware-based method.

Hardware (DSR)
Click to enable DSR (Data Set Ready), a hardware-based method of flow control.

Hardware (CTS)
Click to enable CTS (Clear to Send), a hardware-based method of flow control.

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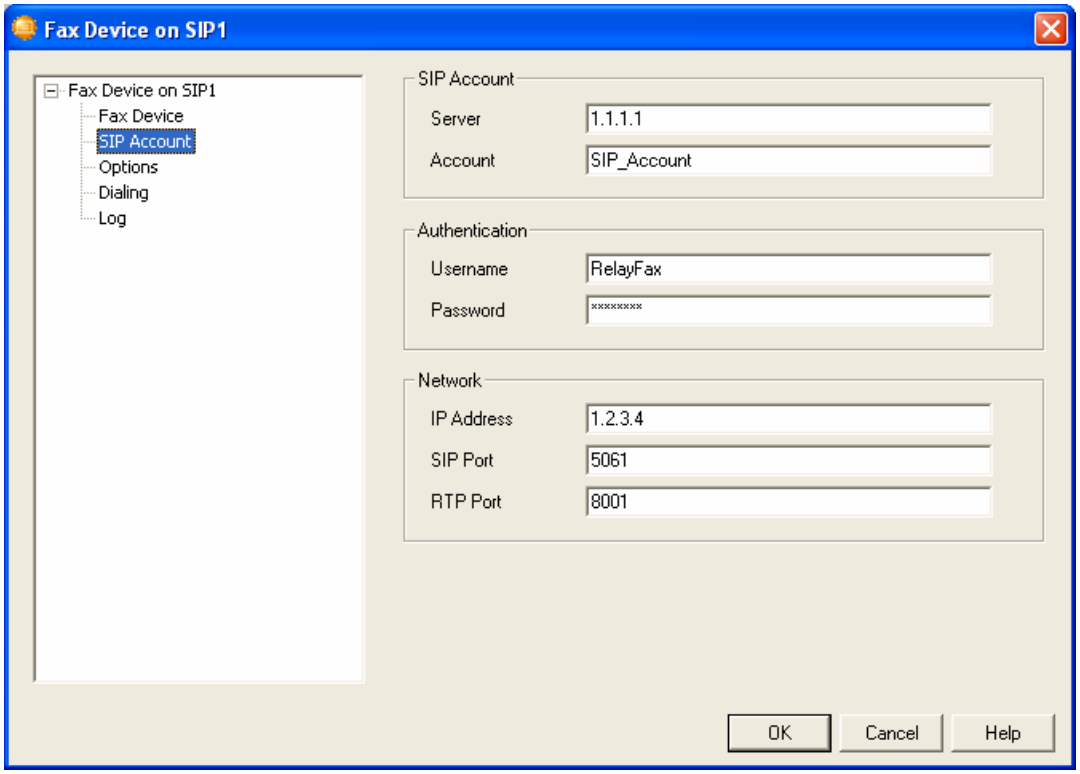
Creating/Deleting Profiles

New
If the settings on this pane are dimmed or unavailable and you wish to edit them, click New to copy the settings to a new profile that you can edit. After clicking *New*, designate a name for the new profile and click *OK*.

Delete
If the displayed profile is one that you have created, clicking this button will delete it and return this pane to its default settings.

2.8.3 SIP Account



Use the options on this pane to configure your virtual T.38 device, after creating the device using the Add Modem 24 dialog. This pane will only be available for T.38 devices.

SIP Account

Server
Enter the host name or IP address of the SIP-based software PBX here. If the server port is not 5060, then a colon and the port number can be appended. For example: "pbx.example.com" or "192.168.1.2:5063".

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Account
In this field, enter the SIP account name or extension. The SIP account name is typically a phone extension.

Authentication

Username
This field is for your login or authentication credential. This is usually the same as the *Account*, but not always.

Password
Enter your username's corresponding password.

Network

IP Address
This is RelayFax's IP address as seen by the SIP Server. If RelayFax is behind a NAT firewall and the SIP Server is outside that firewall, then this will be the external address of the NAT firewall. Consequently, your firewall must be configured to forward the SIP and RTP ports designated below to RelayFax's internal or network IP address. If the SIP Server has direct access to RelayFax, such as if they are both on the same network without a firewall between them, then you can use RelayFax's local IP address here and the ports will not need to be forwarded.

SIP Port
Enter your SIP port setting here. The default is 5060.

RTP Port
This is the port used for the Real-time Transport Protocol (RTP) and T.38 protocol. The default setting is 8000.

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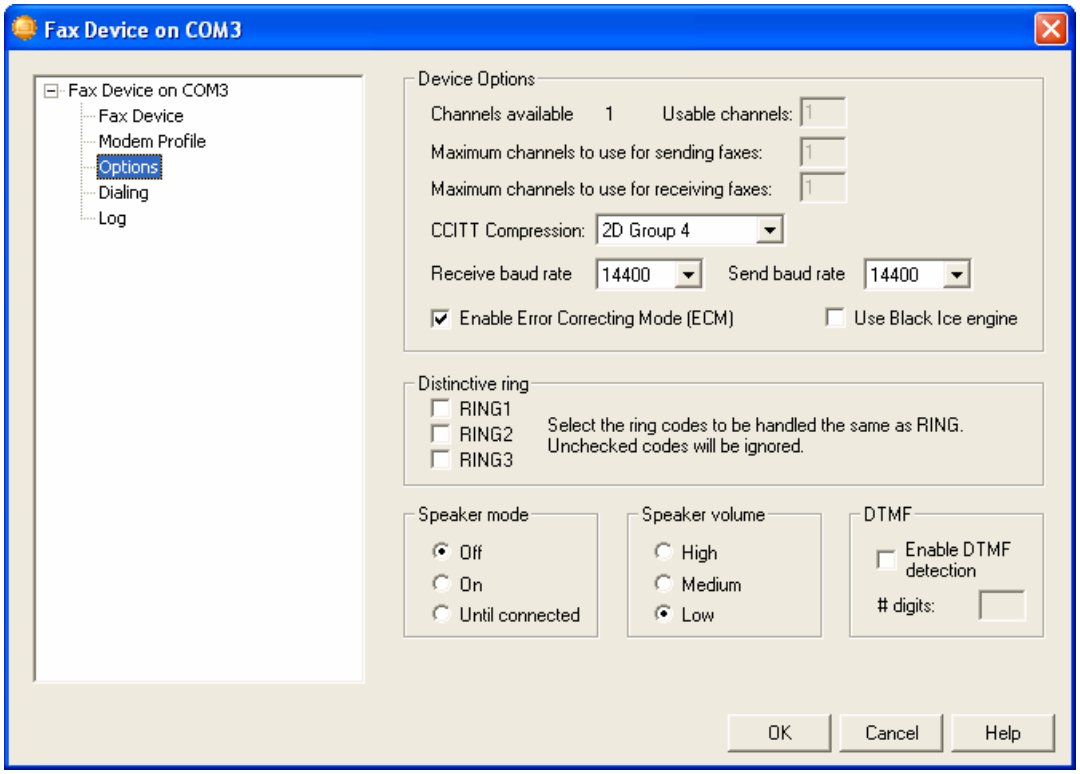
2.8.4 Options



Device Options

Channels

The first few items displayed on this pane have to do with the channels used by the device. The number of available channels, usable channels, and the maximum channels to use for sending and receiving are all listed.

CCITT Compression:

This option designates the highest supported compression that this device can use when sending and receiving faxes.

Receive baud rate

This is the maximum rate in bits per second (bps) at which faxes can be received by the fax device.

Send baud rate

This is the maximum rate in bits per second (bps) at which faxes can be sent by the fax device.

Enable Error Correcting Mode (ECM)

Click this check box to enable Error Correcting Mode (ECM). Receiving devices that support ECM can request that portions of an image be resent if they are received with errors. This is enabled by default for most fax devices.

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Use Black Ice engine
Check this box if you wish to use the Black Ice fax engine with this device instead of RelayFax's native engine. Depending on the device you are using, this option may or may not be available. Some older device architectures may require you to use the Black Ice engine.

Distinctive Ring
If you are using a distinctive ring system, you can use these options to designate the RING patterns to which the fax device will respond. If in incoming call returns a ring code that is disabled here, RelayFax will ignore that call (i.e. the fax device will not answer it).

Speaker Mode
Use this option to designate whether or not the modem's speaker will be activated when the modem is in use. You can choose to leave the speaker Off or On, or you can set it to be activated only Until Connected. The latter option will cause the speaker to be activated only until the modem successfully establishes a connection (for example, while dialing and attempting to connect to a fax number).

Speaker Volume
Use this option to designate the desired volume of your modem's speaker.

Enable DTMF detection
If your device supports voice features, click this option to configure it to listen for DTMF (Duel Tone Multi-frequency, also known as "Touch Tone") signals when answering calls. Any DTMF digits received will be treated as Direct Inward Dialing (DID) by RelayFax for the purpose of routing incoming faxes. RelayFax also is equipped with DTMF support for CAPI devices. As with DTMF support for voice modems, the DTMF digits will be used as DID, but only if no called party number is received. Otherwise, the DTMF digits will be added to the fax number, separated by "x", and that combination will be treated as DID. In that case an account's DID setting would have to look something like, "1234567x1234" in order for the fax to be routed properly.

 # digits
When using the Black Ice engine, you must specify the number of DTMF digits to listen for on the Modem Properties dialog. When using the Alt-N fax engine or CAPI devices, instead of specifying the number of digits, the line will be monitored for ten seconds or until a fax tone is received. You can adjust the timeout value by editing the `VoiceAnswerTimeout` parameter located under the `[FaxServer]` section of the `RelayFax.ini` file.

To send DTMF digits with voice modems or CAPI devices, use the "x" or "@" character to separate the fax number from the DTMF digits. For example, "FAXNUMBER:1234567@1234" will dial "1234567" and wait for silence (lack of ringback), transmit the DTMF digits "1234", and then start the fax transmission. Using "x" instead of "@" allows for the format: "1234567x1234@fax.domain". Note, however, that although RelayFax displays DTMF digits after "x", it actually sends "@" to

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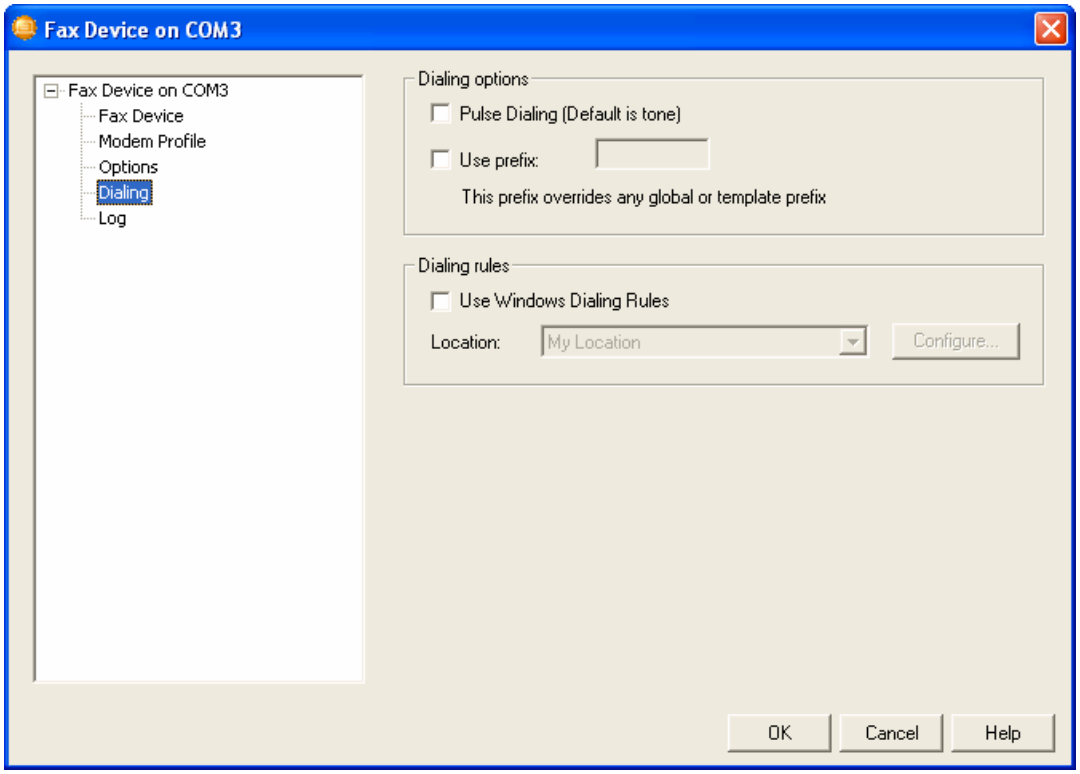
the modem. The modem-specific parameters of the "@" character should be documented in your modem's manual under the "D" command. For CAPI devices, there are several DTMF options in the [CAPI] section of RelayFax.ini to control the delay before and after sending DTMF digits, the length of each digit, and the gap between digits in milliseconds.

2.8.5 Dialing



Dialing Rules

RelayFax supports Windows Dialing Rules. Windows Dialing Rules provide options for handling area and country codes that cannot be implemented using the Outbound Rules. Activating the Use Windows Dialing Rules option enables automatic processing of "canonical" numbers in the form "+<country code> (area code) <number>" (e.g. +1 (616) 555 1212). The "+" is automatically converted into "011" if the call is international, and it prefixes a "1" if the call is domestic long distance. The "+<country code>" is optional but the parentheses are required, and the default country code is automatically prepended if the number does not start with a "+". The windows dialing rules will convert "canonical" numbers to a dialable string according to the options configured in the selected location. Note that the outbound and prefix rules are applied

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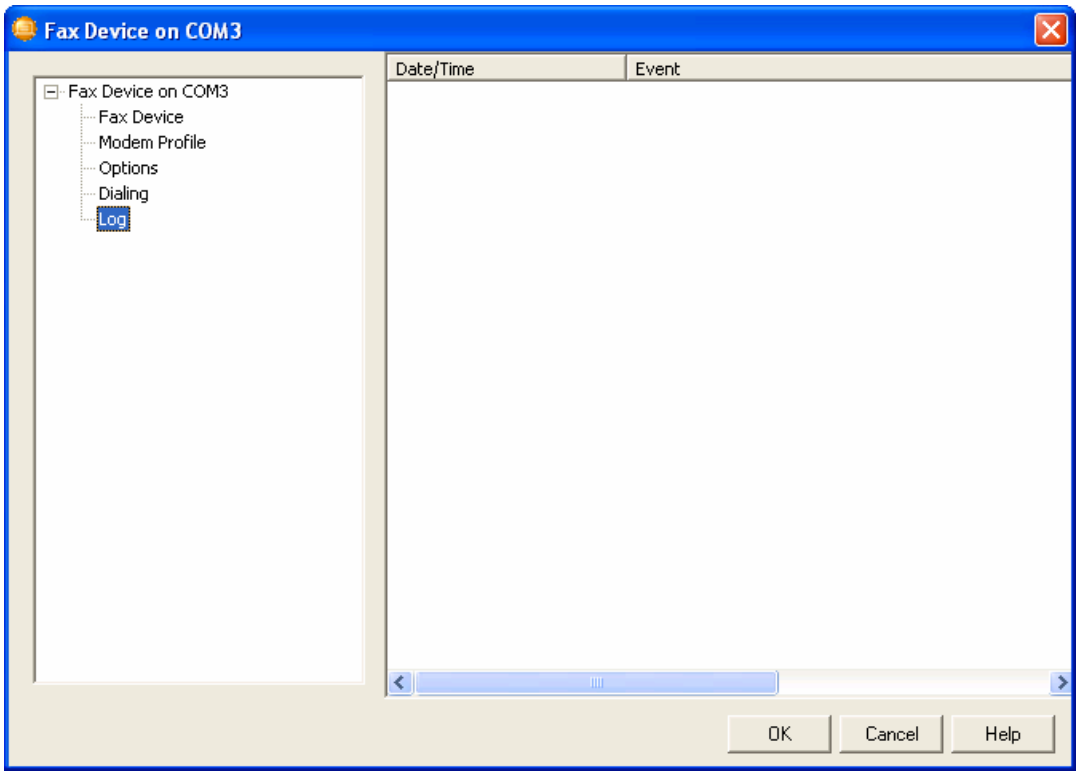
before the Windows Location rules are processed. Fax numbers that are not in the correct format will be dialed unmodified.

2.8.6 Log



This pane displays the most recently logged activities of the fax device. A detailed log of incoming faxes, outgoing faxes, and any errors encountered are all temporarily displayed here before they are combined with other logged events into the primary log files.

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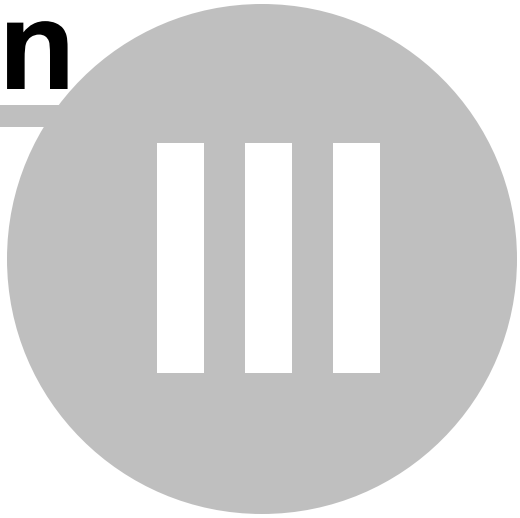
Section



3 RelayFax Properties

3.1 RelayFax Properties

The RelayFax Properties dialog, located under the File»RelayFax properties... menu, contains six panes that are used for configuring various settings and features of your RelayFax Server. These six panes are:

Fax Server 41
The Fax Server pane is used to set up several default settings for you RelayFax Server. Here you will designate the default cover page, banner text 42, company name and address, fax device ID, and fax and voice numbers.

Mail Server 44
Use the Mail Server pane to specify the mail server that the RelayFax Server will connect to for delivering incoming faxes. In addition, this mail server will be used by RelayFax for delivering fax confirmation and failure status messages. You will also specify a default email address and a few other parameters on this pane.

Client Updates 46
On the Shortcut menu of the RelayFax SMTP Client there is an option to "Update RelayFax Client". When a user clicks that option, an update request message is sent to the RelayFax server. The Client Updates pane controls how RelayFax will respond to these update requests.

Options 48
The Options pane of the RelayFax Properties dialog is used to specify several optional settings. These include the number of retry attempts for failed faxes, specifying whether all faxes should be printed or not, whether delivery confirmation requests should be honored, and several others.

Service 51
The Service pane of the RelayFax Properties dialog is used to control whether or not you wish to run RelayFax as a Windows system service. RelayFax can be configured to run as a system service under Windows NT/2000 and under Windows 95/98.

Logs 53
The RelayFax Server maintains a continually updated and highly detailed log of all Faxing Events and POP Sessions. Here you will assign a name and maximum size to that file.

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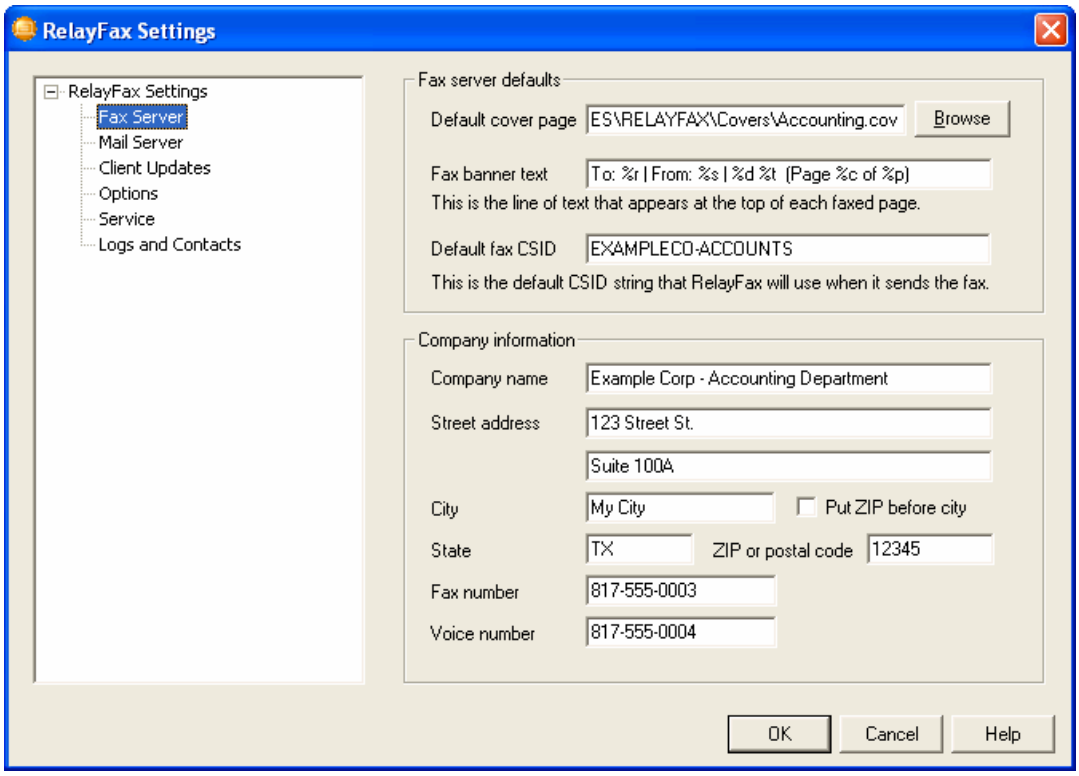
3.2 Fax Server



The Fax Server pane of the RelayFax Properties dialog is used to set up several default settings for your RelayFax Server. Here you will designate the default cover page, banner text, company name and address, fax device ID, and fax and voice numbers.

Fax Server Defaults

Default cover page

This is the path to the cover page to be included with all outbound faxes that have not had an alternate cover page assigned to them, due to Faxing Rules or Templates. The cover page is also the page that is sent when sending a *cover page only* fax.

Fax banner text

RelayFax will insert a line of text at the top of each faxed page. This line is called a banner. With RelayFax it is possible to custom format your banner by entering the desired text and formatting characters into the *fax banner text* option. The banner may be formatted to automatically include various kinds of information such as the date and time, total pages, recipient's or sender's name, CSID, and other options.

If the banner option is left blank, no fax banner will be sent. However, it is common practice to include a banner on outgoing faxes, and in some regions it is even required. For a detailed discussion regarding your banner text, and for a complete list and definition of available formatting characters,

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see:

Banner Text & Formatting Characters 42

Default fax CSID
Each fax device must have a unique Caller Sender Identification (CSID). It is common practice to use either your company name or fax number as your fax ID. When two fax devices are negotiating a connection they make this information available to one another.

In some regions, providing a CSID is required.

Company Information

Company name and address
Enter your company's name and address in this section. It is common practice to provide the company name when sending and receiving faxes. By default this information will appear on outbound cover pages.

Fax number
This is your fax number. By default it will appear on your cover page.

Voice number
This is your voice telephone number. By default it will appear on your cover page.

3.2.1 Banner Text & Formatting Characters

RelayFax will insert a line of text at the top of each faxed page. This line is called a banner. With RelayFax it is possible to custom format your banner to automatically include various kinds of information such as the date and time, total pages, recipient's or sender's name, your fax device's identifier (CSID), and various other options.

By inserting special formatting characters into the banner, you may automatically include some information concerning the fax. See the list below for descriptions of these characters.

Although the banner may be any length, only one line will appear at the top of a fax. This line may consist of up to three parts. These parts are a left-justified portion, a center-justified portion, and a right-justified portion. Each part is separated by the vertical bar character ("|"). Since none of these areas are limited in size, there is the potential that they may at times overwrite one another.

If the banner option is left blank no fax banner will be sent. However, it is common practice to include a banner on outgoing faxes, and in some regions it is even required.

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RelayFax Banner Formatting Characters

The following is a glossary of all valid formatting characters that may be used in the RelayFax Banner:

- **%d** = date in short format
- **%D** = date in long format
- **%t** = send time (24 hour format, e.g. 1:00pm = 13:00:00)
- **%p** = total number of pages in the fax
- **%c** = current page

- **%r** = Recipient's Name
- **%y** = Recipient's Company
- **%s** = Sender's Name
- **%m** = Sender's Company
- **%i** = Sender's Fax ID
- **%u** = Subject of Fax
- **%f** = Recipient's Fax Number
- **%o** = Comments
- **%x** = Sender's Fax Number
- **%h** = Sender's Voice Number
- **%T** = Tracking Number

Inbound Banner Formatting Characters

On the Default Rules 84 pane of the Mail Sources and Rules dialog, you can configure RelayFax to add a banner to inbound faxes. The following formatting characters can be used in that feature:

%d = date in short format

%D = date in long format

%t = send time (24 hour format, e.g. 1:00pm = 13:00:00)

%p = total number of pages in the fax

%c = current page

%r,**%f** = DID number if available, otherwise received port

%s = Caller ID information if available, otherwise Sender's Fax ID

%i = Sender's Fax ID

%T = Tracking Number

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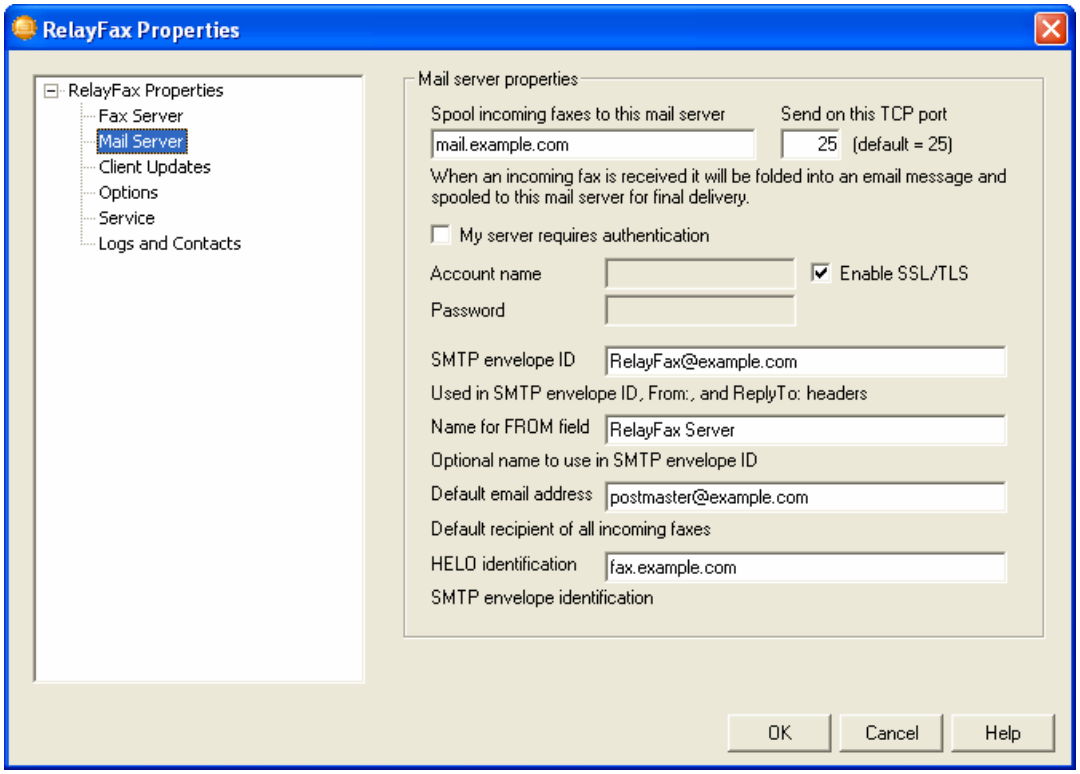
3.3 Mail Server



Use the Mail Server pane to specify the mail server that the RelayFax Server will connect to for delivering incoming faxes. In addition, this mail server will be used by RelayFax for delivering fax confirmation and failure status messages. You will also specify a default email address and a few other parameters on this pane.

Mail Server Properties

Spool incoming faxes to this mail server
When an incoming fax is received it will be folded into an email message and spooled to this mail server for final delivery. Fax confirmation and failure status messages created by the RelayFax Server will also be spooled to this mail server.

Send on this TCP port
RelayFax will use this port when it sends data to your mail server. The default setting is port 25.

My server requires authentication
Tick this check box if you are required to authenticate yourself whenever sending mail to the supplied mail server.

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Account name
Enter the account name or login here that is required by your mail server.

Password
Enter the password required by your mail server.

Enable SSL/TLS
Check this box if you wish to use SSL/TLS when sending messages to the mail server.

SMTP envelope ID
This is the address used in the SMTP "MAIL FROM" command when RelayFax spools an inbound fax or other message to your mail server. It is also used as the FROM and ReplyTo within RelayFax generated messages. Make sure that you specify an address in this field that RelayFax checks for email messages. If you do not specify a valid email address in this control then RelayFax will not receive messages from users when they are attempting to reply to a message that RelayFax sent to them (for example, to have RelayFax resend a failed fax). Thus, RelayFax will not be able to fulfill the commands contained in those messages.

Name for FROM field
Use this control if you want to an optional name to be entered into the name portion of the FROM field of RelayFax generated messages. The default value for this control is "RelayFax Server".

Default email address
If RelayFax cannot determine to whom an incoming fax should be addressed, this default address will be used.

This address must be different than that of your RelayFax email account (specified on the Mail Sources 82 dialog) in order to prevent mail loops.

HELO identification
When spooling an inbound fax to your mail server, RelayFax will identify itself as being a member of this domain.

Example:

```
HELO example.com
```

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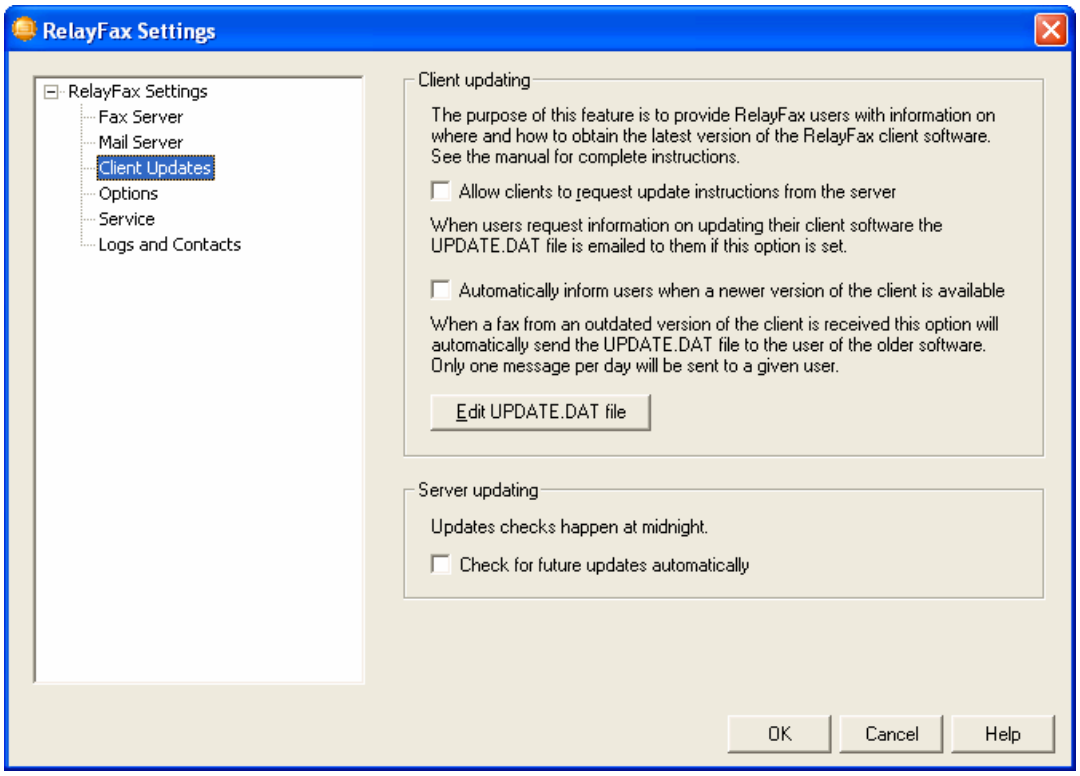
3.4 Client Updates


RelayFax Settings
RelayFax Settings
Fax Server
Mail Server
Client Updates
Options
Service
Logs and Contacts
Client updating
The purpose of this feature is to provide RelayFax users with information on where and how to obtain the latest version of the RelayFax client software. See the manual for complete instructions.
Allow clients to request update instructions from the server
When users request information on updating their client software the UPDATE.DAT file is emailed to them if this option is set.
Automatically inform users when a newer version of the client is available
When a fax from an outdated version of the client is received this option will automatically send the UPDATE.DAT file to the user of the older software. Only one message per day will be sent to a given user.
Edit UPDATE.DAT file
Server updating
Updates checks happen at midnight.
Check for future updates automatically
OK
Cancel
Help

On the Shortcut menu 129 of the RelayFax SMTP Client there is an option to "Update RelayFax Client". When a user clicks that option, an update request message is sent to the RelayFax server. The Client Updates pane controls how RelayFax will respond to the update requests. If you have configured RelayFax to honor update requests it will email the contents of the `UPDATE.DAT` file to the user making the request. This file is located in the `\RelayFax\app\` subfolder and can be edited with any plain text editor such as Notepad. To simplify the editing process you can click *Edit UPDATE.DAT file* on this pane to open it in your default text editor.

This pane also provides the option to automatically send the update message to any users who send a message to RelayFax from an older version of the client. This is a more "user friendly" method since they will not need to remember to check for updates; they will be informed automatically whenever the version they are using is out of date.

Client Updating

Allow clients to request update instructions from the server
Click this checkbox if you want RelayFax to email the contents of `UPDATE.DAT` to users who click *Update RelayFax Client* on their client's shortcut menu.

If this option is not checked then RelayFax will simply delete update requests without responding to them.

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Automatically inform users when a newer version of the client is available
Enable this control if you want RelayFax to automatically send update information to users who send a message to RelayFax using an outdated version of the client.

Edit UPDATE.DAT file
Click this button to open *UPDATE.DAT* in your default text editor. You may utilize three macros in this file so that the contents of the response message will be specific to the recipient:

`$CURRENTVERSION$`	Will be replaced by the current version number of the RelayFax SMTP Client.
`$YOURVERSION$`	Will be replaced by the version number of the user's client.
`$ATTACHMENT<filepath>$`	Will attach a file to the update message being sent. For example: `$ATTACHMENT<c:\RelayFax\App\rfcl700_en.exe>$` This would attach the client installation file to the response message.

Rather than attaching the latest version of the Client to the message, you can conserve bandwidth and resources by editing the UPDATE.DAT file to include a URL to a location from which the user can download it instead.

See the `UPDATE.DAT` file included with RelayFax for an example message.

Server Updating

Check for future updates automatically
Click this checkbox if you want RelayFax to check for updates automatically each day at midnight. When a RelayFax software update is available, a notification email will be dispatched to the Default email address designated on the Mail Server 44 pane of the RelayFax Properties dialog (File»RelayFax properties...»Mail Server). This option will appear dimmed and not accessible if your update protection has expired. In order to restore automatic update functionality you will need to renew your RelayFax update protection.

You can manually check for updates at any time from an option on the Help menu (Help»Check for RelayFax updates...).

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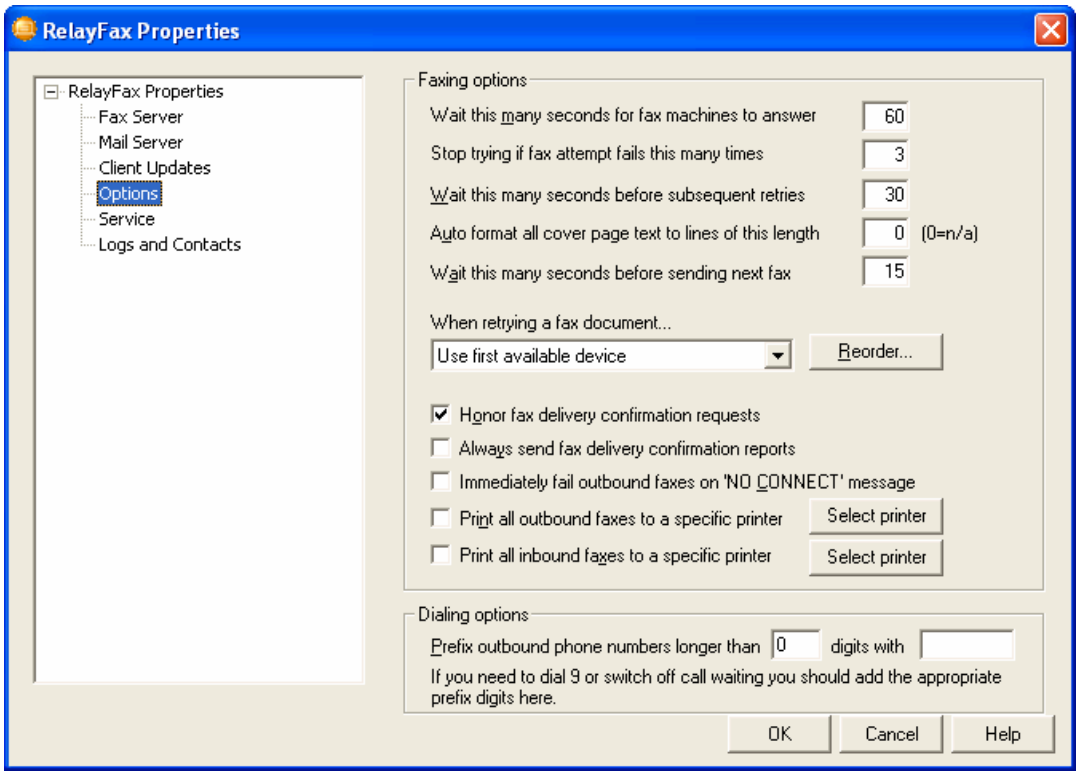
3.5 Options



The Options pane of the RelayFax Properties dialog is used to specify several optional settings. These include the number of retry attempts for failed faxes, specifying whether all faxes should be printed or not, whether delivery confirmation requests should be honored, and several others.

Faxing Options

Wait this many seconds for fax machines to answer
If the Fax number to which RelayFax is trying to connect doesn't answer within this many seconds, RelayFax will abort the attempt and try again later based upon the parameters outlined below.

Stop trying if fax attempt fails this many times
When a fax attempt fails, RelayFax will continue trying to send the fax until it has failed this many times. After this number of unsuccessful attempts RelayFax will give up permanently and inform the sender that the fax could not be sent. The default setting is "3". If you enter "0" or "1" in this option then RelayFax will not try to send the fax again if the initial attempt fails.

During retries of partially completed faxes, by default RelayFax will only attempt to resend unsent pages. If you wish to

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> configure RelayFax to attempt to resend the entire fax instead, open `RelayFax.ini` in Notepad and change `ResendPartialFaxes=Yes` to `ResendPartialFaxes=No` under `[FaxServer]`.

Wait this many seconds before subsequent retries
This is the amount of time between subsequent delivery attempts.

Auto format all cover page text to lines of this length
Placing a value in this control will cause text placed in the cover page's comments section to have line breaks inserted at the specified length. Setting this control to "0" will cause the text to appear exactly as it was typed by the user. If the text was composed without any line breaks, and it extended beyond the edge of the designated comments area, then it would be truncated.

Wait this many seconds before sending next fax
This is the number of seconds that RelayFax should wait between sending faxes.

When retrying a fax document...
Choose the option from the drop-down list that you wish to use when RelayFax retries sending a fax.

Use first available device
When this option is selected, RelayFax will use the first available fax device when retrying to send a fax, with priority give to the order in which the devices appear in the list. Click *Reorder...* to change the order of the devices.

Use next available device
Choose this option if you want RelayFax to retry sending a fax on a different device than the one used on the previous attempt. If you have only one device then this option has no effect.

Reorder...
Click this button to open the list of your fax devices. You can select a device and then use the up/down arrows on the dialog to reorder the list. When retrying faxes, priority is given to the devices in the order they are listed.

Honor fax delivery confirmation requests
RelayFax is equipped with the ability to inform users of the status of their outgoing faxes. When this option is enabled and RelayFax receives a message for faxing from the RelayFax SMTP Client or an regular email client requesting a Return Receipt, a short message will be emailed back to the sender when the fax has been successfully delivered. The confirmation message will only be sent when the sender's RelayFax SMTP Client is set to use the *I want confirmation that this fax was sent properly* 154 option, or when the Return-Receipt-To header is present in an email message. This option only affects whether or not delivery *confirmation* messages are sent. The sender will always be informed when a fax cannot be delivered, regardless of this setting.

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Always send fax delivery confirmation reports
Enable this check box if you wish to send a message to the sender of an outgoing fax message when the fax is successfully delivered, regardless of whether or not the sender requested delivery confirmation. This option only affects delivery confirmation messages. When a fax cannot be delivered RelayFax will inform the sender regardless of this setting.

Immediately fail outbound faxes on 'NO CONNECT' message
Check this box if you do not wish to send a fax signal when RelayFax detects that a person rather than a fax device answered the dialed number. RelayFax will treat the outbound fax as failed and proceed accordingly.

Print all outbound faxes to a specific printer
Enable this control if you want RelayFax to automatically print a copy of all documents that it receives for outbound faxing. These documents will be printed to whichever printer you have designated in the Select Printer dialog.

Print all inbound faxes to a specific printer
Click this option if you want a copy of all faxes that RelayFax receives to be printed to a specific printer. Click the Select printer button beside this control to choose the printer.

Select Printer
Click this button to open the Select Printer dialog.

For a complete discussion on the Select Printer dialog and printing in general, see: Select Printer 55.

Dialing Options

Prefix outbound phone numbers longer than [xx] digits with [xx]
For outgoing faxes, you can have RelayFax automatically add a prefix to the called party's number. Prefixes may, for instance, be necessary to access a central office line, or to restrict the transmission of your Caller ID to the called party. RelayFax will, however, add the prefix to the number only if the number contains more digits than the amount specified here. If your fax device is connected to a PBX, the digit threshold can prevent the prefix from being dialed if the called number is an extension on the same PBX. Enter both the digit threshold and the prefix to be dialed into this option. Use "0" in the first box if you wish to add the prefix to all numbers dialed.

When specifying numbers for RelayFax to dial, you can use "w" or "W" to instruct RelayFax to wait for a subsequent dial tone. For example, "8w5551212" will dial 8, wait for the next dial tone, and then dial the remainder of the number. Similarly, the "%" character will insert a pause within the dialing process. For example, "8%5551212" will dial 8, pause, and then dial the rest of the number. The length of time during a pause is determined by modem S register settings.

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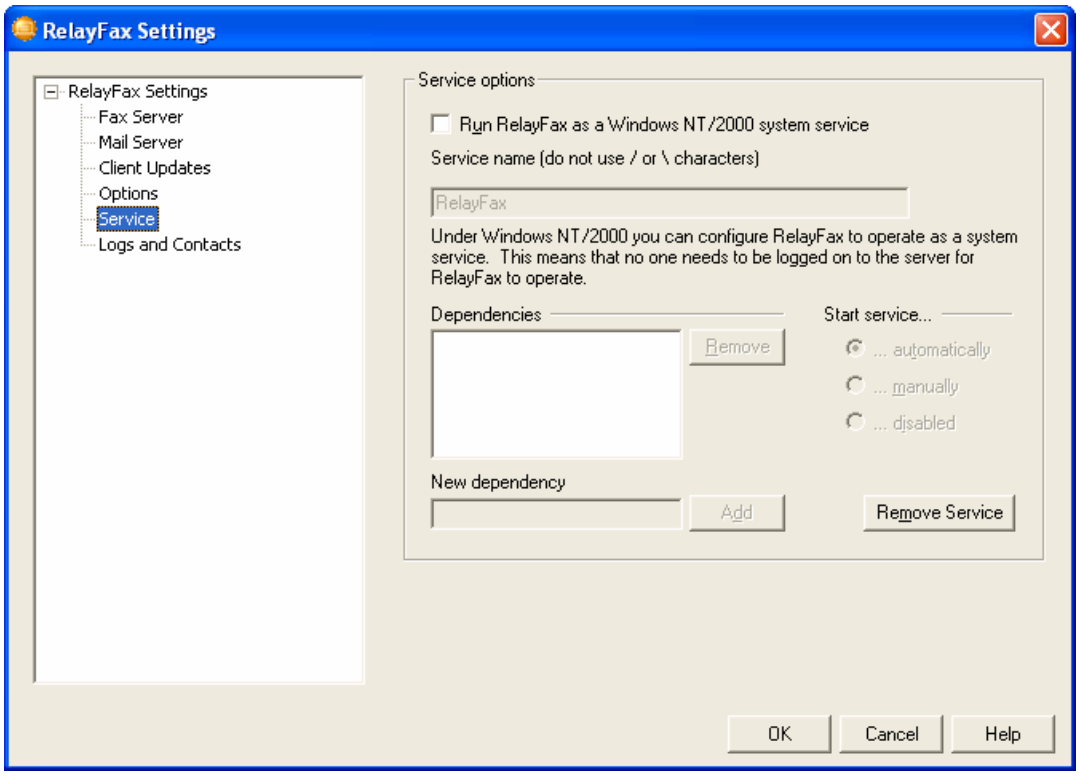
3.6 Service



The Service pane of the RelayFax Properties dialog is used to designate whether or not you will run RelayFax as a Windows system service. Running RelayFax as a service allows it to start when Windows starts, allows it to operate when no users are logged in to Windows, and provides greater security.

Service Options

Run RelayFax as a Windows system service
Enable this check box if you wish to run RelayFax as a service. Windows services have a number of configurable options such as Dependencies and Start-up choices.

Service Name (do not use / or \ characters)
This is the designated name of the service.

Dependencies
This list box displays the names of any services that must start before RelayFax does.

Remove
Click this button to remove a selected Dependency from the Dependencies list box.

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New Dependency
Enter the name of a service upon which you wish the RelayFax service to be dependent and click the Add button to add it to the list of Dependencies.

Add
Click this button to add a service, which you have entered into the New Dependency text box, to the Dependencies list.

Start Service
This is the initial state of the service.

Automatically - starts the service when Windows starts.

Manually - starts the service only via user intervention.

Disabled - does not start the service at all.

Install Service
Click this button to install or remove the RelayFax service.

For more information on Windows Services and Dependencies, consult your Windows help files and documentation.

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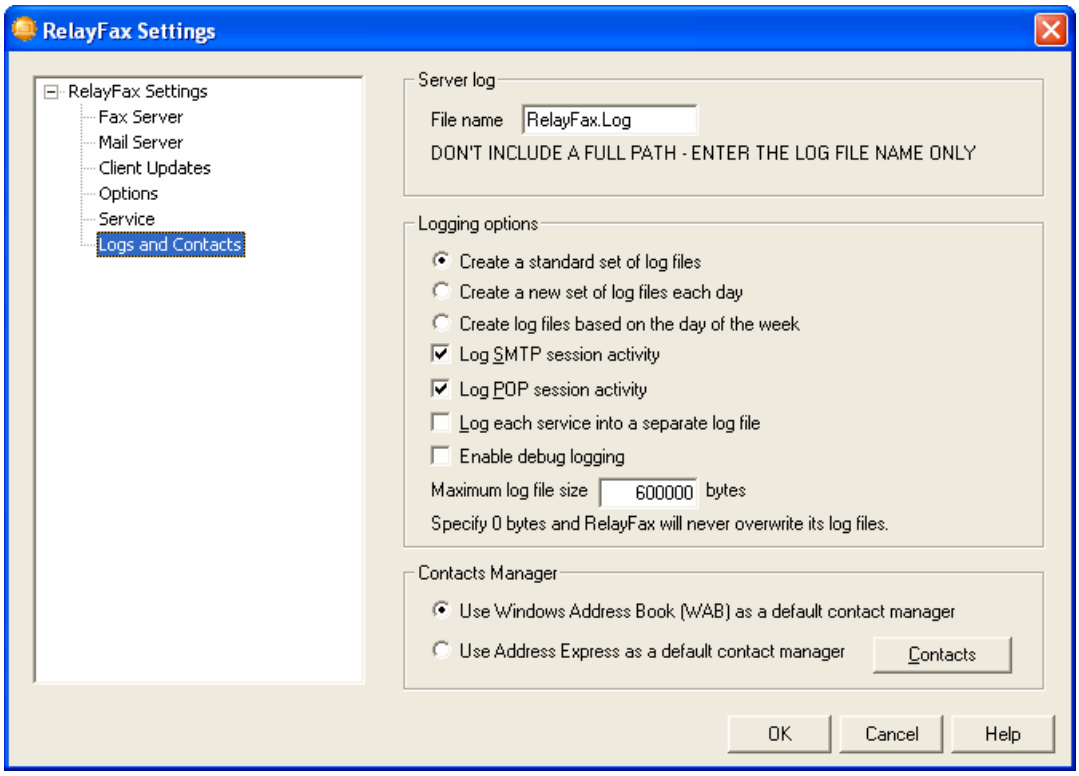
3.7 Logs and Contacts



The RelayFax Server maintains a continually updated and highly detailed log of all Faxing Events and POP and SMTP Sessions. In the top section you can assign a name for your server log file. In the next section you can specify the maximum permitted log file size and configure several other logging-related options. At the bottom of this pane you can choose which contact manager to use by default. You can choose either the Windows Address Book or Address Express.

Server Log

File Name

Designate a name for your server log file here. It is called `RelayFax.Log` by default. Do not include the path to the file; only enter the filename.

Logging Options

Create a standard set of log files

Click this option to maintain a standard single set of log files.

Create a new set of log files each day

If this option is selected then separate log files will be generated each day. The names of the files will correspond to the date they were created.

Create log files based on the day of the week

If this option is selected, separate log files will be generated for each day of the week. The names of the log files will correspond to the day of the week on which

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they were created.

Log SMTP Session Activity
Click here if you want the log to contain transcripts of SMTP session activity with your mail servers.

Log POP Session Activity
Click here if you want the log to contain transcripts of POP session activity with your mail servers.

Log each service into a separate log file
Click this checkbox if you want RelayFax to maintain separate logs by service rather than in a single file. For example, RelayFax will log SMTP activity in a separate log file than other activity.

Enable debug logging
Click this check box to enable debug logging, which is more verbose and resource intensive. This is only recommended when you are attempting to diagnose a problem with RelayFax.

Maximize log file size [XX] bytes
Use this control to designate a maximum size (if any) for RelayFax's log file. When the file reaches this size it will be saved with the file extension *.OLD. Then, a new RelayFax *.Log file will be created and maintained until it also reaches the maximum size. At that time the *.OLD log file will be overwritten by the new *.OLD file, and so on. If you do not wish to lose previously saved *.OLD files then you must save those files under a different name or extension before the RELAYFAX.LOG file reaches the maximum allowed size.

If you designate Max Size [xx] Bytes as 0 the *.Log file will never be saved as *.OLD and then reset. However, depending upon the volume of server use, this could result in a very large log file.

Contacts Manager

Use Windows Address Book (WAB) as a default contact manager.
Choose this option if you wish to use the Windows Address Book as your default contacts manager in RelayFax.

Use Address Express as a default contact manager.
Choose this option if you wish to use the Address Express contact manager that is included with RelayFax.

Contacts
Click this button to open your default contact manager 110.

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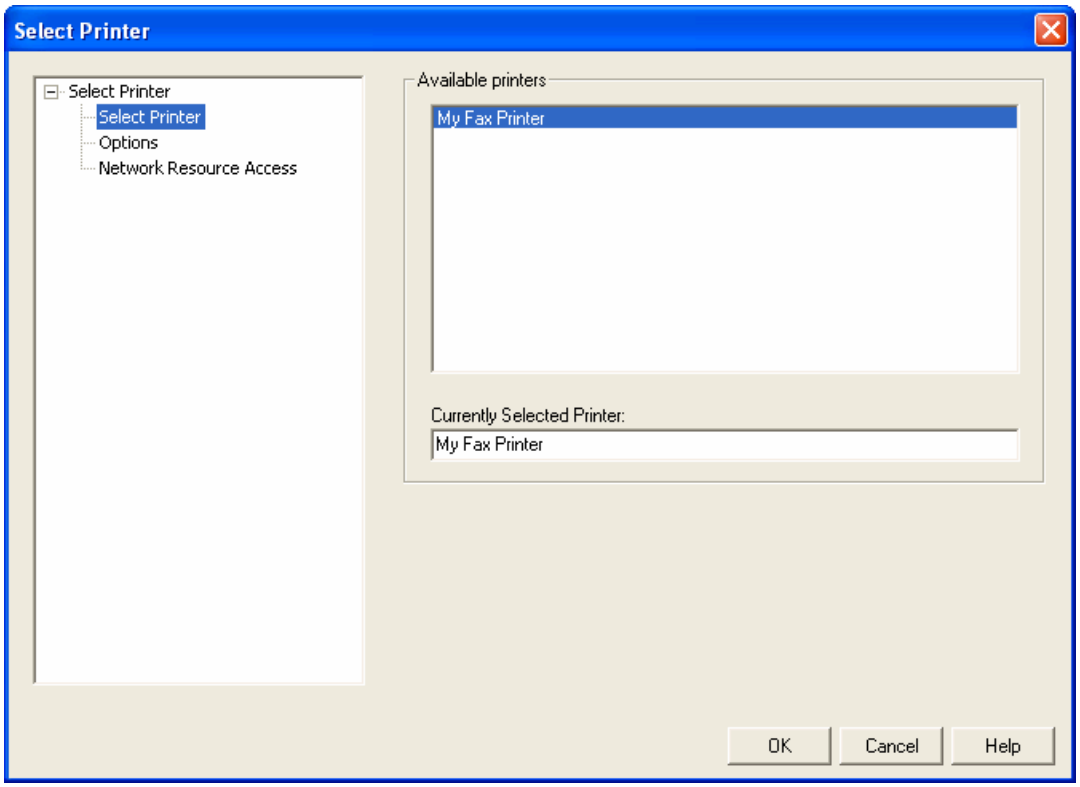
See also:

Log Window 20
Contact Manager 110

3.8 Select Printer

3.8.1 Select Printer



This dialog is opened when you click one of the *Select printer* buttons on the Options 48 pane of the RelayFax Properties dialog or the Default Rules 84 pane of the Mail Sources and Rules dialog. It will also be opened when you choose the *Print fax to specific printer* action when creating a new inbound 92 or outbound 86 fax rule. Use the Select Printer pane to choose which printer the corresponding option will print to, and then use the other panes to set any other necessary options, such as paper settings or network access credentials.

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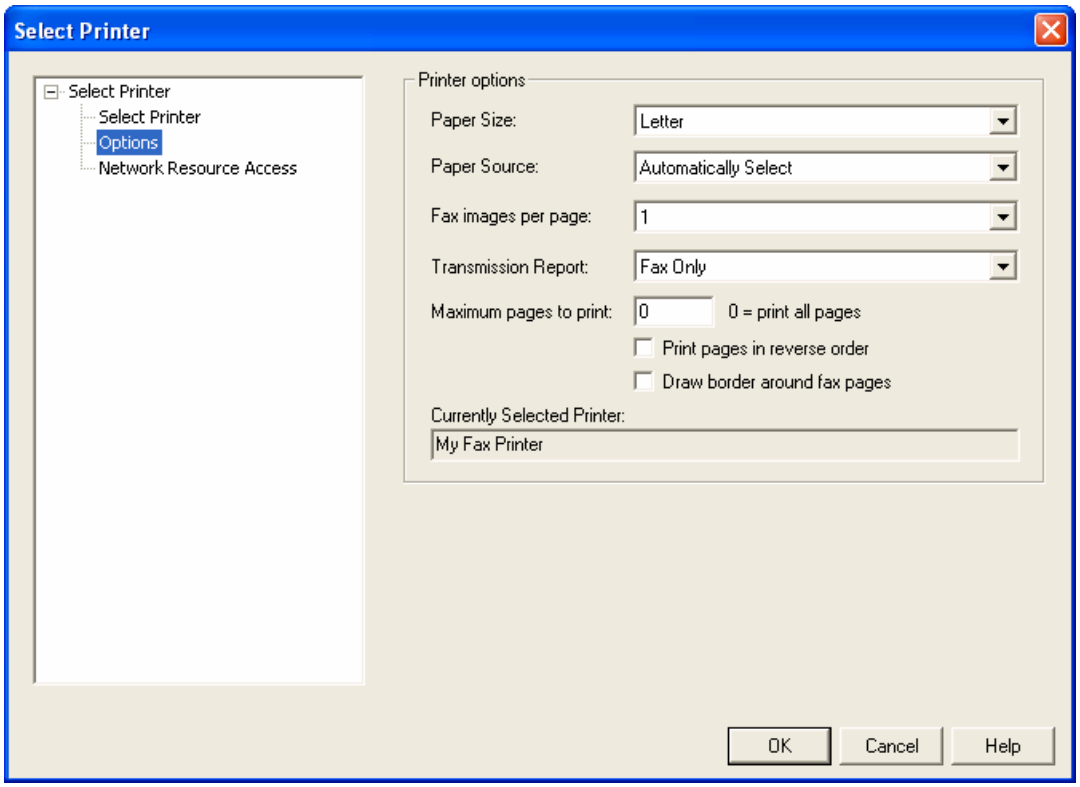
Available Printers
This area will display all printers that are available for RelayFax to use when configured to print inbound or outbound faxes. To select a printer simply click on the desired entry in this list and then click OK.

Currently Selected Printers
This text box displays the name of the printer that you have selected to be used by the corresponding option that opened the Select Printer dialog.

See also:

Select Printer Options 56
Network Resource Access 57

3.8.2 Options



Use the options on this pane to specify your desired settings for the selected printer. You can select the paper size and source, the number of fax images that you wish to print per page, the maximum number of pages to print per fax, and other settings. With the Transmission Report drop-down list you can designate whether or not to print a transmission report along with each printed fax. Alternatively, you can choose to print a transmission report only, instead of the fax.

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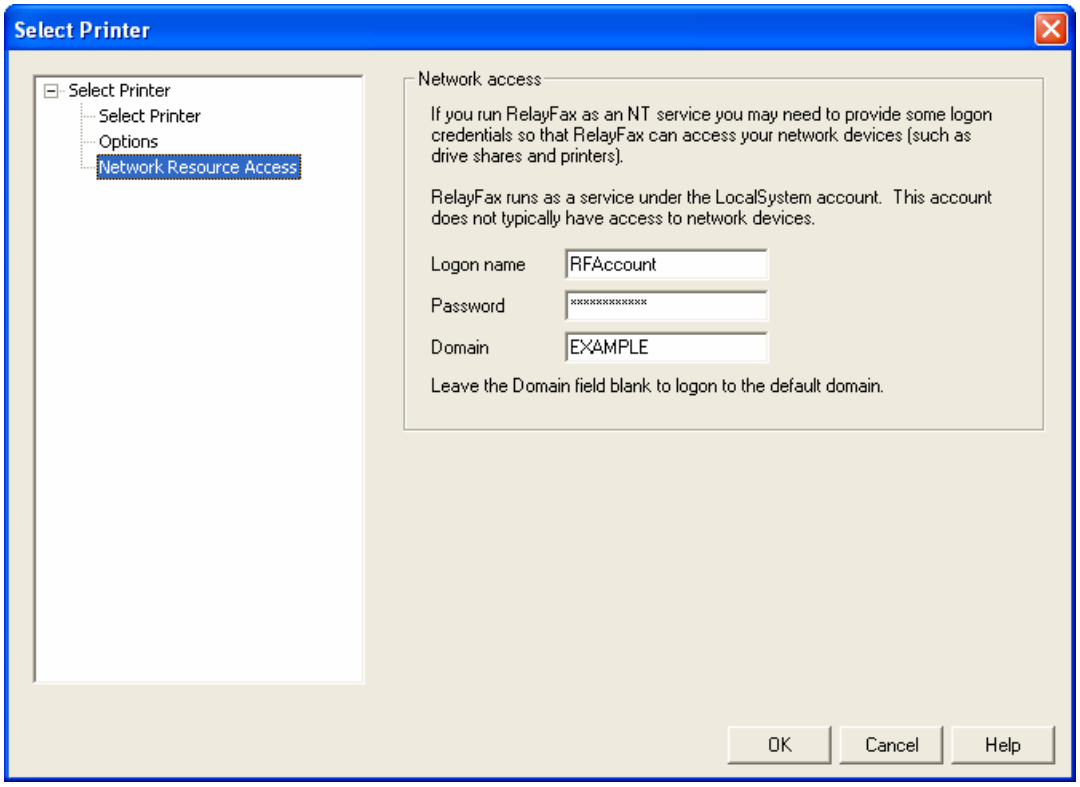
See also:

Select Printer 55
Network Resource Access 57

3.8.3 Network Resource Access


Select Printer
Select Printer
Select Printer
Options
Network Resource Access
Network access
If you run RelayFax as an NT service you may need to provide some logon credentials so that RelayFax can access your network devices (such as drive shares and printers).
RelayFax runs as a service under the LocalSystem account. This account does not typically have access to network devices.
Logon name
RFAccount
Password
Domain
EXAMPLE
Leave the Domain field blank to logon to the default domain.
OK
Cancel
Help

The Network Resource Access pane can be reached from the Select Printer dialog, or it can be opened as a separate dialog from the File»Network resource access... menu selection. If you run RelayFax as a service and need access to drive shares or you wish to print to a network printer, you may have to provide RelayFax with some access credentials. Normally, RelayFax will run as a service using what is called the \"LocalSystem\" account. This account has no logon or password associated with it, therefore software running as \"LocalSystem\" may not be allowed access to some network devices. To ensure that RelayFax can access your network devices you can provide the logon and password of an account that has access to them. When login credentials are included on this dialog RelayFax will log in as that account rather than the \"LocalSystem\" account.

Logon Name
Enter the logon name of a valid Windows user account that has access to your network devices.

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Password
Enter the password to the above account.

Domain
Optionally, enter the domain with which the user account is associated. If you leave this field blank RelayFax will try to log in to the default domain.

Printing under a windows network can be difficult to set up. You must take steps to make sure that the printer you are trying to access across your network has the correct permissions configured to allow RelayFax to access it. Sometimes printer access problems can be resolved by setting up the network printer to allow print access from any member of the "EVERYONE" group. This includes the \"LocalSystem\" account and therefore works when RelayFax is setup to run as a system service.

See also:

Select Printer 55
Select Printer Options 56

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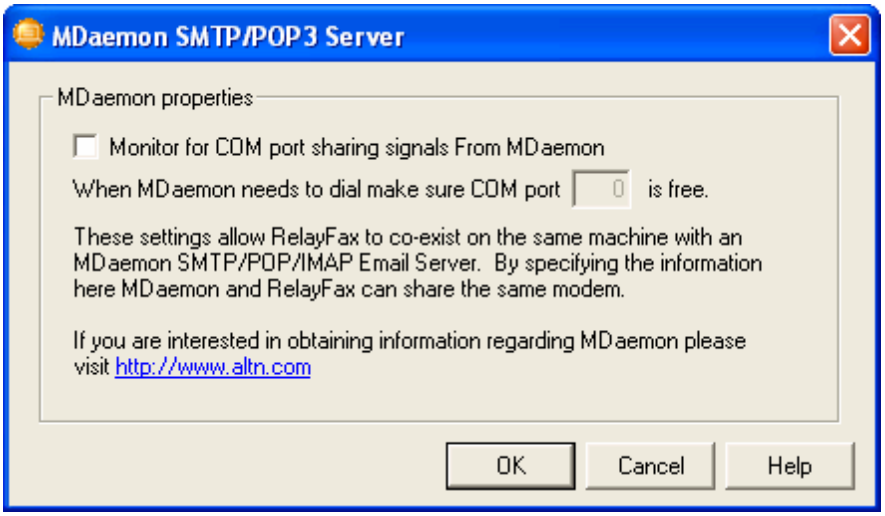
Section

4 MDaemon SMTP/POP3 Server

4.1 MDaemon Server Settings


MDaemon SMTP/POP3 Server
MDaemon properties
Monitor for COM port sharing signals From MDaemon
When MDaemon needs to dial make sure COM port
0
is free.
These settings allow RelayFax to co-exist on the same machine with an MDaemon SMTP/POP/IMAP Email Server. By specifying the information here MDaemon and RelayFax can share the same modem.
If you are interested in obtaining information regarding MDaemon please visit http://www.altn.com
OK
Cancel
Help

Although RelayFax can be used with any email server, it has been designed to work exceptionally well with Alt-N Technologies' MDaemon Server for Windows. It can share a modem with MDaemon and integrates well with your MDaemon user list and MDaemon's WorldClient webmail component.

The options on the MDaemon Properties dialog (File»MDaemon properties...) make it possible for RelayFax to be installed on the same machine as your MDaemon Server and share a single modem with MDaemon without causing any conflicts. Immediately before MDaemon attempts a dialup connection it will create a file called PREDIAL.SEM. At the close of the connection, POSTDIAL.SEM will be created. RelayFax can look for these files before dialing and thus avoid attempting to use the modem when it is already in use by MDaemon.

Within MDaemon, you must specify at least 2 redial attempts in the RAS configuration pane in order for this feature to be utilized.

MDaemon Settings

Monitor for COM port sharing signals from MDaemon
Enable this switch if you want RelayFax to share a COM port with MDaemon.

When MDaemon needs to dial make sure COM port [xx] is free
When RelayFax detects that MDaemon needs to dial, it will free this port for MDaemon's use. If necessary, RelayFax will suspend listening for faxes while the port is in use by MDaemon.

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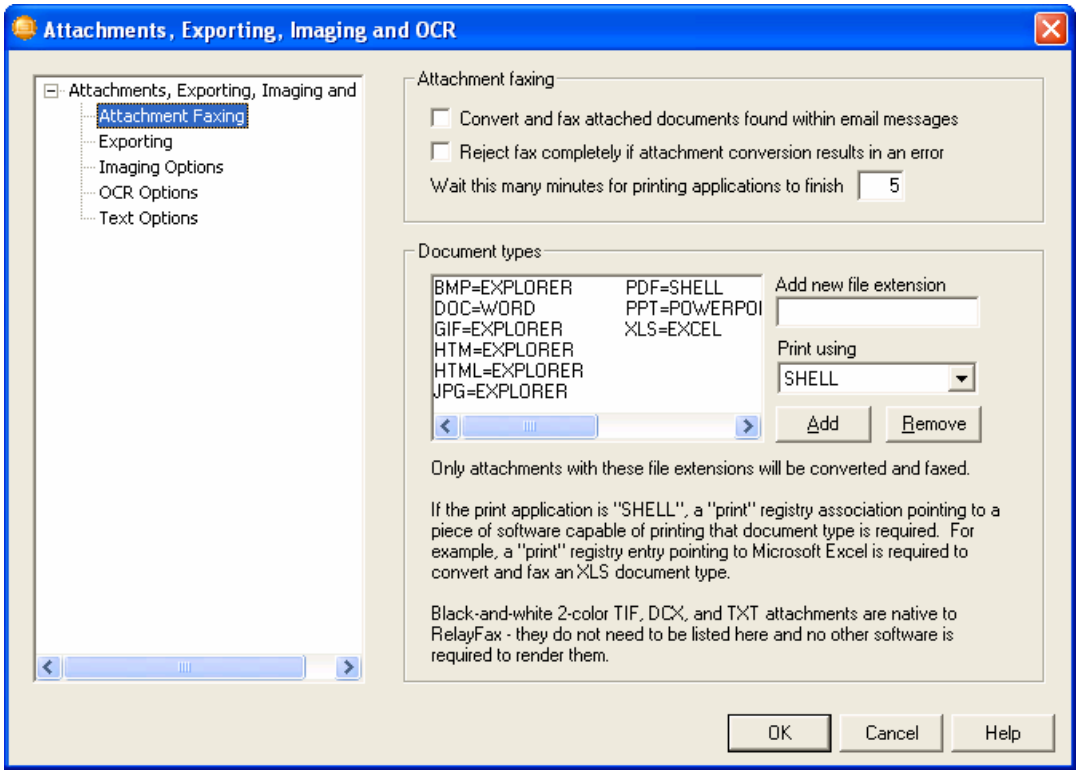
Section V

5 Faxing Options & Exporting

5.1 Attachment Faxing


Attachments, Exporting, Imaging and OCR
Attachments, Exporting, Imaging and
Attachment Faxing
Exporting
Imaging Options
OCR Options
Text Options
Attachment faxing
Convert and fax attached documents found within email messages
Reject fax completely if attachment conversion results in an error
Wait this many minutes for printing applications to finish
5
Document types
BMP=EXPLORER
DOC=WORD
GIF=EXPLORER
HTM=EXPLORER
HTML=EXPLORER
JPG=EXPLORER
PDF=SHELL
PPT=POWERPOI
XLS=EXCEL
Add new file extension
Print using
SHELL
Add
Remove
Only attachments with these file extensions will be converted and faxed.
If the print application is "SHELL", a "print" registry association pointing to a piece of software capable of printing that document type is required. For example, a "print" registry entry pointing to Microsoft Excel is required to convert and fax an XLS document type.
Black-and-white 2-color TIF, DCX, and TXT attachments are native to RelayFax - they do not need to be listed here and no other software is required to render them.
OK
Cancel
Help

RelayFax has the ability to extract attachments and fax them automatically. For example, it is possible for you to send an email message to the RelayFax Server which contains an Excel or Word document as an attachment and then have the RelayFax server extract the document, invoke the associated application to print it to a special print driver, and then fax the resulting image. Any number of separate attachments can be attached and f

axed in this manner, and page breaks within any given document will be honored and cause multiple pages to be faxed. The settings on the Attachment Faxing pane allow you to control various aspects related to attachment faxing.

RelayFax Print Redirector

When the RelayFax server extracts an attached document from an email message it must convert that document to a faxable image format. This is accomplished by invoking the application associated with the listed document type and then printing it to a special print driver called, "RelayFax Print Redirector." The RelayFax Print Redirector is installed as part of the RelayFax Server package. If "SHELL" is designated for the document type, then there must be a "print" registry association for that document type pointing to an application capable of printing the document. For example, Microsoft Word is associated with the "print" shell command for documents with the extension ".DOC". When a .DOC file is extracted from an email message, Microsoft Word is invoked and the attached document is printed to the RelayFax Print

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Redirector.

All documents printed to the RelayFax Print Redirector must be printed in "Fine FAX Resolution 204 x 196 DPI." This value is set automatically during installation and is located within the RelayFax Print Redirector's printing preferences, under *Printers and Faxes* on the Windows Start menu or Control Panel. Exercise caution in changing this value, since failure to set the correct resolution could result in improperly formatted fax images that appear out of scale or otherwise deformed.

The RelayFax Print Redirector logs its activities into a file called `REDIRECT.LOG`, located in the `RelayFax\app\` directory.

The RelayFax Print Redirector must be set as the Default Printer because RelayFax invokes applications that will print to the Default Printer only.

Since it is possible for some applications to run macros when opening and printing certain types of documents, be aware of possible security concerns that you may have when choosing which application to associate with a given document type.

Further, it is possible to attach URL and HTML files to a message and have RelayFax invoke your browser to render the URL or HTML file to fax a completed document. However, when processing URL or HTML attachments, care must be taken since HTML documents can contain Java applets, JavaScript, and the like, which will be executed when the URL or HTML is rendered by the web browser. It is up to the administrator to determine if URL or HTML attachments should be processed through RelayFax.

Attachment Faxing

Convert and fax attached documents found within email messages
Click this switch to turn on the attachment faxing feature. Without this switch set RelayFax will not fax documents attached to email messages.

Reject fax completely if attachment conversion results in an error
Enable this option if you wish to reject a fax when an error occurs during an attachment's conversion. RelayFax will send a message to the sender to let him or her know that the fax couldn't be sent. Uncheck this box if you want RelayFax to send the fax anyway, even if an error occurs, as long as there are some other pages to be sent.

Wait this many minutes for printing applications to finish
For each attachment, this is the number of minutes that RelayFax will wait for notification that the RelayFax Print Redirector has finished converting the document. If no notification is received in this amount of time then the conversion fails and RelayFax will proceed accordingly based on your other settings. This setting is necessary because occasionally some applications require user input and would

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effectively wait forever for that input without printing or exiting. Also some documents can take a very long time to print, depending on the size of the document and the associated application.

Document types
When the *Convert and fax attached documents...* option above is enabled, the document types listed here will be extracted, converted, and faxed. Since black and white 2-color TIF, DCX, and TXT file attachments are native to RelayFax, those document types do not need to be listed, nor is any other software required for RelayFax to render them. They will be converted and faxed regardless of the Attachment Faxing dialog's settings.

Add new file extension / add
To add a new document type to the list, enter a new file extension, use the *Print using* drop-down list to choose the application that you wish to associate with it, and click *Add*.

Print using
When adding a new document type, use this drop-down list to choose the application that will be used to print documents of that type. If you choose SHELL then a "print" registry association must exist for that document type.

Remove
If you wish to delete a document type, select it from the list and then click *Remove* to delete it.

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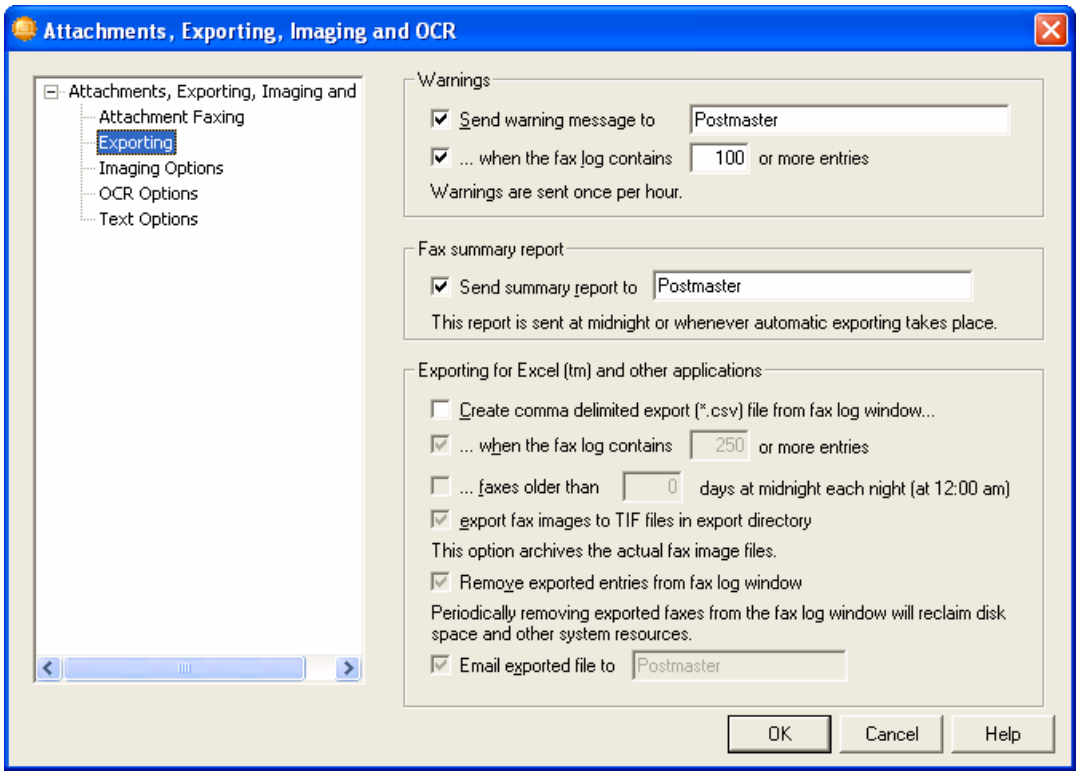
5.2 Exporting


Attachments, Exporting, Imaging and OCR
Attachments, Exporting, Imaging and
Attachment Faxing
Exporting
Imaging Options
OCR Options
Text Options
Warnings
Send warning message to
Postmaster
... when the fax log contains
100
or more entries
Warnings are sent once per hour.
Fax summary report
Send summary report to
Postmaster
This report is sent at midnight or whenever automatic exporting takes place.
Exporting for Excel (tm) and other applications
Create comma delimited export (*.csv) file from fax log window...
... when the fax log contains
250
or more entries
... faxes older than
0
days at midnight each night (at 12:00 am)
export fax images to TIF files in export directory
This option archives the actual fax image files.
Remove exported entries from fax log window
Periodically removing exported faxes from the fax log window will reclaim disk space and other system resources.
Email exported file to
Postmaster
OK
Cancel
Help

The options on the Exporting pane can be used to create industry standard comma-separated values (CSV) files containing detailed information about each faxed document processed by RelayFax. These files can be easily imported into applications such as Microsoft Excel or Access or any other software package that accepts comma delimited files as input.

Exporting also helps RelayFax better manage server resources. Since each fax entry in the log window consumes valuable resources, older entries must periodically be removed to free up space for new fax documents. Use of the exporting options will allow you to manage the log window in an automated fashion. With these features you will be able to operate RelayFax in the most efficient manner possible while still maintaining a detailed database of information regarding faxing operations and a complete archive of all fax document image files.

RelayFax maintains the results of export operations in the `RelayFax\Exports\` subfolder. Each comma delimited export file is given a name that corresponds to the date and time of the export event and it is placed in a subfolder named for the date of that event. For example, if an export event occurs on Jan 10, 2009 at 11:55:00, a subfolder called 2009-01-10 will be created within the `\Exports\` folder and an export file called `2009-01-10-11-55-00.CSV` will be placed within it. Multiple exports can be performed on the same day and they will be placed in the same subfolder but will have slightly different file names.

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Warnings

Send warning message to [XX]
Click here and specify an email address where RelayFax should direct its warning messages. You can have multiple addresses specified here if you separate each with a comma.

...when the fax log contains [XX] or more entries
Click here and specify a threshold value if you want RelayFax to send a warning message to the address designated above when the number of fax entries present in the log window meets or exceeds the specified value.

Fax Summary Report

Send summary report to...
Click this checkbox and fill in one or more email addresses (separated by commas) and RelayFax will send them a summary of all fax activity currently listed in the log window. This report is not as detailed as the file generated by the export process and is in a format typical of standard fax devices. It will be emailed to the addresses just before midnight each night or whenever automatic exporting occurs.

Exporting for Excel™ and other applications

Create comma delimited export (*.csv) file from fax log window...
Click here if you want RelayFax to create export files automatically. For more information on the format of RelayFax's CSV files, see: Export File Format 67.

...when the fax log contains XX or more entries
Click here and specify a threshold value if you want RelayFax to perform an export operation whenever the number of fax entries present in the log window meets or exceeds this value.

...faxes older than XX days at midnight each night (at 12:00 am)
Click this option to enable daily exporting. At midnight each night, all faxes older than the specified number of days will be exported. For example, a value of "2" would mean that faxes would remain in the fax log for two full days before being exported at midnight.

Export fax images to TIF files in export directory
When this option is enabled, TIF images of each faxed document will be created and placed in the export directory along with the comma-delimited export file. This will allow you to keep archives of all fax images. When a fax image is placed in the export directory, its name will be the fax's unique tracking number, with `.TIF` as its file extension. For example, "`5254.TIF`" or "`6523.TIF`." You can match an image to a record in the comma-delimited file by using this tracking number.

Remove exported entries from fax log window
Click this option and RelayFax will automatically remove exported faxes from the fax log window. In this way the log window can be automatically pruned of old faxes and server resources can be conserved. Periodic removal of old faxes from the log window is required to reclaim disk space and other resources devoted to

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an entry when it is present there.

If this option is disabled then the entries in the Fax Log Window will not be removed after an export file is created. Thus, when later export files are created these files will be exported again. If you do not want an entry to be included in future export files then it must be deleted from the fax log window, either manually or by enabling this option.

Email exported file to XX
Enable this option and specify an email address and the comma-delimited file created during an export event will be folded into an email message and sent to the specified address. You can specify more than one address by separating each with a comma.

See Also:

Export File Format 67

5.2.1 Export File Format

The format of the comma-delimited export file is as follows:

TNUMBER	This field contains the unique identifier assigned to this fax. If image files were also exported then this value is used as the filename of the exported image file.
FSTATUS	4 = SENT, 8 = FAILED, 16 = RECEIVED
PRIORITY	Indicates the priority value assigned to this fax. The default of 50 will be automatically assigned to incoming faxes. Outgoing faxes can be assigned any value between 0 and 100
RNAME	This is the name of the recipient of the fax - if known.
FAXNUMBER	If this is a SENT fax, this is the number to which it was sent.
SUBJECT	This is the subject of the fax - if known.
FROMLINE	This is the name or email of the sender of the fax.
BANNER	This is the banner string that was used when sending the fax.

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COVERPAGE	This is the path to the cover page that was used when sending the fax.
SCOMPANY	This is the sender's company name setting (used in the template files).
RCOMPANY	This is the recipient's company name – if known.
SFNUMBER	This is the sender's fax number setting (used in the template files).
SVNUMBER	This is the sender's voice telephone number (used in the template files)
LFAXID	This is the ID string of the local fax machine – if known.
STIMEOUT	This is the timeout value used when sending the fax.
MAXRETRIES	This is the maximum potential retries available when sending the fax.
RETRYDELAY	This is the delay in seconds between subsequent attempts to retry a failed fax.
SSCHFAXY	This is the year the fax was scheduled for transmission.
SSCHFAXMO	This is the month the fax was scheduled for transmission.
SSCHFAXD	This is the day the fax was scheduled for transmission.
SSCHFAXH	This is the hour the fax was scheduled for transmission.
SSCHFAXMI	This is the minute the fax was scheduled for transmission.
SSCHFAXS	This is the second the fax was scheduled for transmission.
SSENDFAXY	This is the year the fax was sent.
SSENDFAXMO	This is the month the fax was sent.
SSENDFAXD	This is the day the fax was sent.
SSENDFAXH	This is the hour the fax was sent.

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SSENDFAXMI	This is the minute the fax was sent.
SSENDFAXS	This is the second the fax was sent.
SENDRES	This is the resolution the fax was sent with - 0=LOW, 1=HIGH
RFAXID	This is the fax ID of the remote site.
SPEED	This is the baud rate of the connection (ex: 9600, 14400, etc)
RCVRES	This is the resolution the fax was received with - 1=LOW, 2=HIGH
TOTPAGES	This is the total number of pages in the fax.
PAGESSENT	This is the total number of pages sent.
HANGCODE	This is the +FHNG result of a fax transfer. The meaning of this field can depend on the type of modem you are using.
PORT	This is the port that was used during a fax transfer.
RETRIESUSED	This is the actual number of retries attempted when sending a fax.
DURATION	This is the number of seconds it took to complete the fax transfer. This number is cumulative for faxes sent over multiple tries.
CLASS	This is the fax class used – 1=CLASS 1, 2=CLASS 2, 3=CLASS 2.0
ERRORCODE	This is the error or result code of the fax transfer. 0 = NO ERROR 1 = ERROR
STREET1	The sender's street address.
STREET2	The sender's secondary address, or second line of their street address.
CITY	The sender's city.
STATE	The sender's state or province.
ZIP	Sender's zip or postal code.
HOMEPHONE	This is the sender's home telephone number.

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HOMEFAX	This is the sender's home fax number.
BUSPHONE	The sender's business phone number.
BUSFAX	Sender's business fax number.
BILLINGCODE	The billing code of the sender.
IMAGESIZE	This field contains the size (in bytes) of the fax image disk file.
COUNTER	Always contains a value of "1".
EXPORTIMAGE	Was fax image exported? 0 = FAX IMAGE NOT EXPORTED 1 = FAX IMAGE EXPORTED
DID	This is the Direct Inward Dial number.
ERRORSTRING	If ERRORCODE=0, this column is empty, otherwise it contains a description of the error.
RETRYDURATIONS	Contains the duration, in seconds, of each fax retry attempt. For example, if there were three attempts to deliver a particular fax, then the entry might look like this: "30,20,40." This would indicate three retry attempts with durations of 30, 20, and 40 seconds respectively. The export file's DURATION column defined above is the sum of all attempts, or the total time to transfer the fax.

See Also:

Exporting 65

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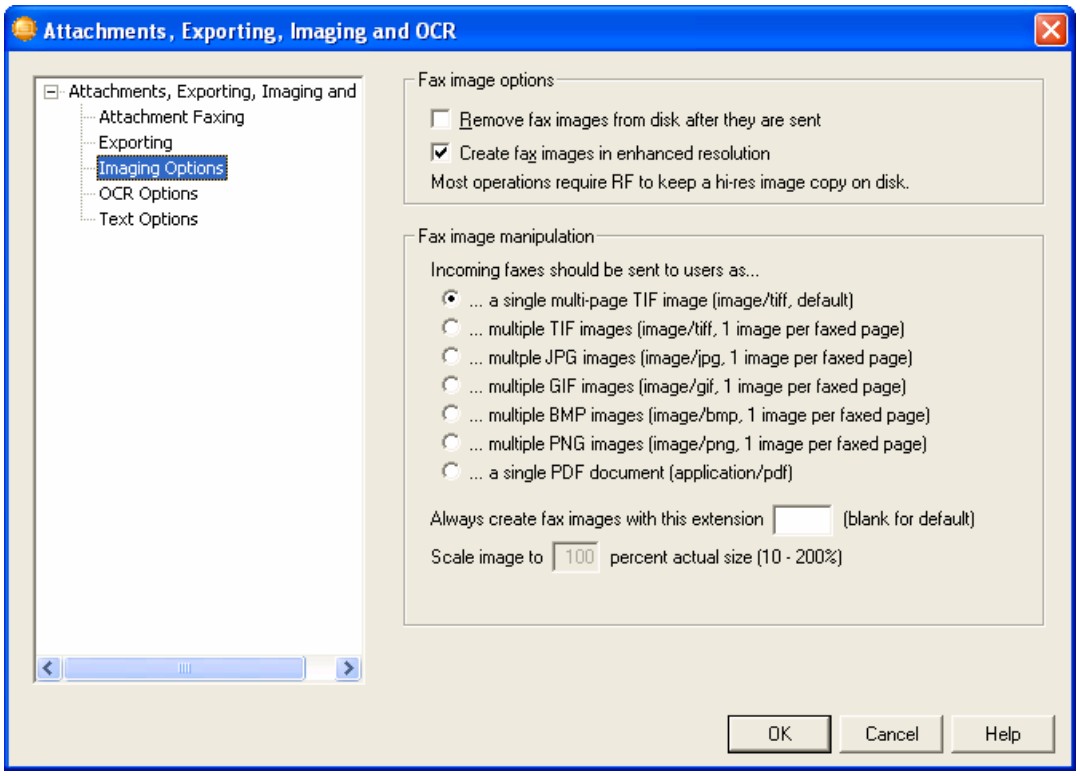
5.3 Imaging Options


Attachments, Exporting, Imaging and OCR
Attachments, Exporting, Imaging and
Attachment Faxing
Exporting
Imaging Options
OCR Options
Text Options
Fax image options
Remove fax images from disk after they are sent
Create fax images in enhanced resolution
Most operations require RF to keep a hi-res image copy on disk.
Fax image manipulation
Incoming faxes should be sent to users as...
... a single multi-page TIF image (image/tiff, default)
... multiple TIF images (image/tiff, 1 image per faxed page)
... multple JPG images (image/jpg, 1 image per faxed page)
... multiple GIF images (image/gif, 1 image per faxed page)
... multiple BMP images (image/bmp, 1 image per faxed page)
... multiple PNG images (image/png, 1 image per faxed page)
... a single PDF document (application/pdf)
Always create fax images with this extension
(blank for default)
Scale image to
100
percent actual size (10 - 200%)
OK
Cancel
Help

The Imaging Options pane is used for configuring RelayFax's handling of fax images. You can designate whether or not images will be stored after they have been sent, whether to use enhanced resolution when creating them, the image format that will be used when emailing faxes to your users, and several other options.

Fax Image Options

Remove fax images from disk after they are sent
Enable this control if you want RelayFax to delete fax image files from disk after they have been delivered to their final destination. Since fax image files can be somewhat large, this feature can be used to conserve storage space if that is of concern to you.

Several features require the fax image to be present on disk (for example: viewing the image from the Fax Window on the main interface). Consequently, if you are removing images from the disk not all features will be available.

Create fax images in enhanced resolution
Use this switch if you wish to send high-resolution images when a document is faxed. Selecting this switch provides superior fax image quality but consumes a bit more disk space and transmission time.

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Fax Image Manipulation

Incoming faxes should be sent to users as...
This is the image format that will be used when sending incoming faxes to your users in the form of email attachments.

a single multi-page TIF image (image/tif, default)
This is the default setting. When selected it will cause a single multi-page Tag Image File Format (TIFF) image of the incoming fax to be attached to the message. This file will have the TIF extension.

multiple TIF images (image/tif, 1 image per faxed page)
This option will cause a separate TIFF image to be attached for every page that the fax contained. This can be useful since some TIFF viewers do not support multiple pages.

multiple JPG images (image/jpg, 1 image per faxed page)
Causes one JPEG image to be attached per faxed page.

multiple GIF images (image/gif, 1 image per faxed page)
When this option is selected, RelayFax will attach a single Graphic Interchange Format (GIF) image for each page that the fax contained.

multiple BMP images (image/bmp, 1 image per faxed page)
Multiple Bitmap (BMP) images will be attached when this option is chosen.

multiple PNG images (image/png, 1 image per faxed page)
Multiple Portable Network Graphic (PNG) images will be attached when this option is chosen.

a single PDF document (image/pdf)
This option sends incoming faxes to users as a single multi-page Portable Document Format (PDF) file.

RelayFax also supports PDF encryption. To create encrypted PDF files, choose this imaging option and add the following to your RelayFax.ini file:

```
[PDF]
Encrypt=Yes
```

`OwnerPassword=`	(Recommended) An owner password gives full access to the document. No owner password means that anyone can change the permissions.
`UserPassword=`	Designating a user password means that it will be required to open the document.
`Permissions=-44`	"-64" disallows all...no printing, editing, copying, and so on. "-44" permits printing and copying but disallows modifying the contents and annotations. "-4" allows all. For more on encryption and permissions, see the Adobe PDF Specification

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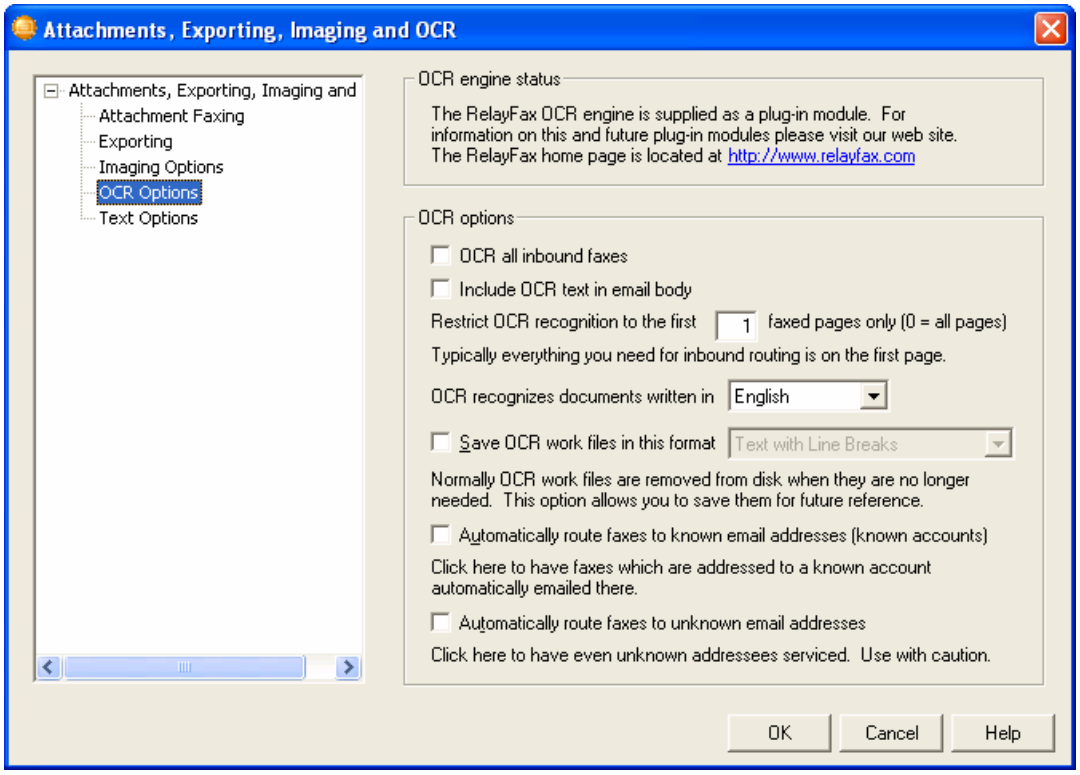
at adobe.com.

The following options will not be available when you choose the *single multi-page TIF image* option above.

Always create fax images with this extension [xx] (blank for default)
If you want the file attachments to have an extension other than the given format's default setting, specify that extension here.

Scale image to [xx] percent actual size (10-200%)
Specify a percentage in this option if you want the attached image file to be scaled to a different size than the original fax image. You may specify any value from 10% to 200%.

5.4 OCR Options


Attachments, Exporting, Imaging and OCR
Attachments, Exporting, Imaging and
Attachment Faxing
Exporting
Imaging Options
OCR Options
Text Options
OCR engine status
The RelayFax OCR engine is supplied as a plug-in module. For information on this and future plug-in modules please visit our web site. The RelayFax home page is located at http://www.relayfax.com
OCR options
OCR all inbound faxes
Include OCR text in email body
Restrict OCR recognition to the first 1 faxed pages only (0 = all pages)
Typically everything you need for inbound routing is on the first page.
OCR recognizes documents written in English
Save OCR work files in this format Text with Line Breaks
Normally OCR work files are removed from disk when they are no longer needed. This option allows you to save them for future reference.
Automatically route faxes to known email addresses (known accounts)
Click here to have faxes which are addressed to a known account automatically emailed there.
Automatically route faxes to unknown email addresses
Click here to have even unknown addressees serviced. Use with caution.
OK
Cancel
Help

RelayFax is equipped with Optical Character Recognition (OCR) technology that can be used to route incoming faxes based upon their content rather than just the sender's fax ID or the port on which faxes arrive. RelayFax's OCR engine will scan the incoming fax and recognize any typewritten text that it contains. Using the OCR options and Inbound Fax Rules 92, you can configure RelayFax to route faxes automatically based

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on names and email addresses it finds, and you can search for specific text and then route faxes based upon the results of the search.

The OCR Options pane is used to configure the various options associated with RelayFax's OCR capabilities. You can specify the number of pages that will be read, the language that you want OCR to recognize, whether or not you want the OCR files to be saved and the format in which to save them, and whether or not RelayFax should automatically route the fax to your users when if finds one of their names in the fax.

Document recognition is not just limited to incoming faxes. You can also recognize a document manually by clicking "File»Recognize..." and then specifying both the file that you want to be recognized and the format in which you want it to be saved.

OCR is only effective for typewritten documents; it cannot recognize handwriting.

OCR engine status

RelayFax's OCR engine is supplied as a plug-in module. If you have not yet installed it then this section will contain a message informing you that it needs to be installed. It also contains a hyperlink to the RelayFax web site from which the module can be downloaded. If the OCR module is not installed then the controls below this section will be dimmed. They will not be accessible until it is installed.

OCR options

OCR all inbound faxes

Click this check box if you want to OCR scan all incoming faxes.

Include OCR text in email body

Click this check box if you want to include the resulting text of OCR scans in the body of email messages. This option is independent of the $ATTACHOCRFILE$ macro 198 — if you are using this option and that macro, the OCR files will still be attached to the email.

Restrict OCR recognition to the first [xx] faxed pages only

By default, only the first page of incoming faxes will be recognized. If you want RelayFax to recognize more than the first page then you can use this control to specify an alternate number. If you want all pages to be recognized then enter "0".

OCR recognizes documents written in...

There are several languages that the OCR engine is capable of recognizing. From the drop-down list box choose the language that you want it to look for when recognizing the documents.

Save OCR work files in this format...

By default, the results of the OCR process will be used for routing purposes and then deleted. However, RelayFax provides the option to save these files for your use. This is a highly useful feature because the files can be saved in the most commonly used document formats, including: Microsoft Word, Microsoft Excel, WordPerfect, Adobe Acrobat, HTML, Lotus, plain text, text with line breaks, and others. If you

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want to save these files then click this checkbox and choose the desired format from the drop-down list box. Each file will be saved in RelayFax's \Faxfile\ subfolder along with the TIFF file with which it is associated. OCR files will be saved with the extension ".ocr" regardless of the format in which they were saved. Some software products may not support files without certain file extensions, so in some cases it may be necessary to rename the *.ocr file before it can be viewed by your product. When you have configured a rule to email an OCR document to someone, the file extension will be renamed to match the appropriate document format. Manually recognizing a document (File»Recognize...) will cause it to be saved with the chosen format's file extension as well.

OCR technology isn't perfect. Characters with similar shapes, unusual fonts, or fuzzy or unclear text may cause some mistakes in the documents resulting from the OCR process. However, in most cases only a moderate amount of editing will be required to correct these mistakes.

Automatically route faxes to known email addresses (known accounts)
Click this option if you want RelayFax to automatically route incoming faxes to your users when the OCR engine finds an account holder's real name in a document. For example, if Frank Thomas had a fax account on your RelayFax server, enabling this option would cause any fax containing "Frank Thomas" to be routed to him automatically without the need to create a specific fax rule to do so.

Automatically route faxes to unknown email addresses
When this switch is enabled, the OCR engine will scan the fax for the first email address that it contains and then automatically route the fax to that address, even if it is otherwise unknown to RelayFax (not a known account). RelayFax will use Regular Expression Matching to determine what portion of the recognized text constitutes an email address. The Regular Expression syntax that RelayFax uses to extract addresses is located in the RelayFax.ini file and appears as follows:

```
[OCR]
LinePattern=[Tt][Oo]?:[a-zA-Z0-9\.]+@[a-zA-Z0-9\.]+
EmailPattern=[a-zA-Z0-9\.]+@[a-zA-Z0-9\.]+
```

RelayFax first uses LinePattern= to extract the line that contains an email address. Then the address is extracted from that line by using EmailPattern=, which almost assures a reliable result. If you need to adjust either of these values due to your particular situation, you can easily do so by editing their corresponding INI entries.

Enabling this feature will in effect cause RelayFax to become an open fax gateway for any user. That is, of course, the goal of this feature, but it may violate your local network policy.

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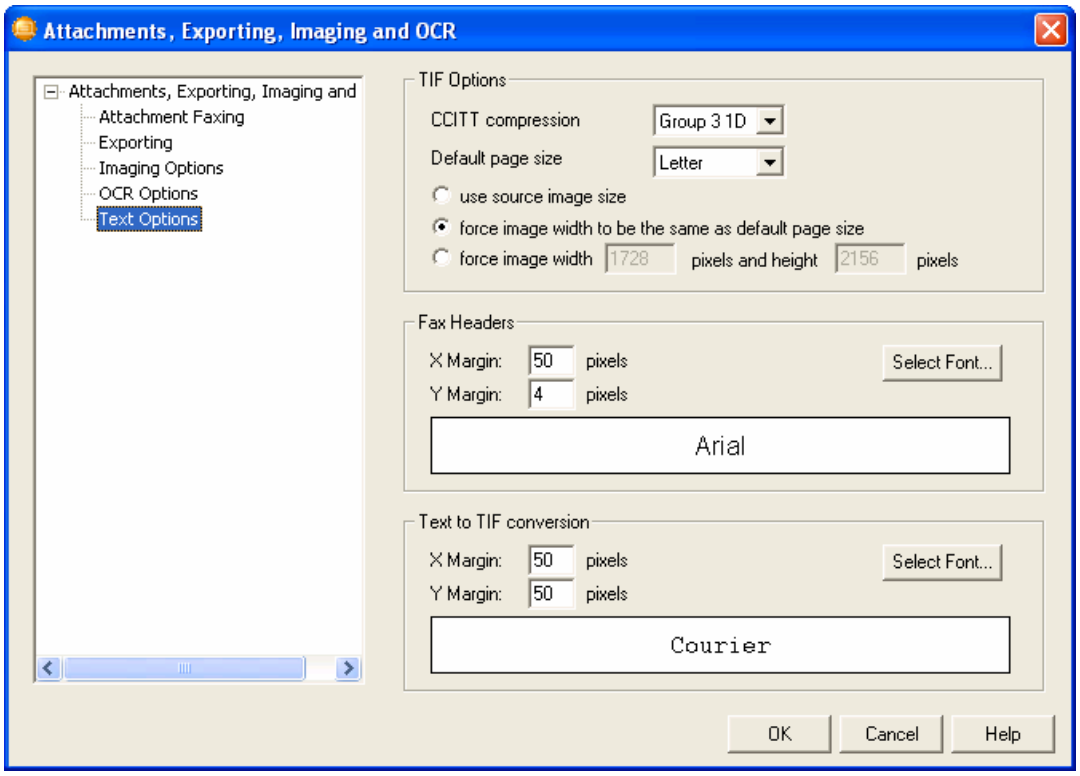
5.5 Text Options



TIF Options
The options in this section govern how RelayFax will handle various aspects of the fax images when sending faxes.

CCITT compression
This is the CCITT compression format used for all TIF files that RelayFax places in the FaxFile folder.

Default page size
This option sets the default page size for the cover pages generated by RelayFax.

use source image size
Choose this option if you do not wish to resize the fax image before sending.

force image width to be the same as default page size
Choose this option if you wish to force the width of the fax image to be the same as the default page size designated above.

force image width [xx] pixels and height [xx] pixels
Choose this option if you wish to set the height and width of the fax image to a specific number of pixels.

Fax Headers
Use the options in this section to set the margin size and font that will be used for the

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inbound and outbound fax banners.

Text to TIF Conversion
When there is a plain text attachment or the text for the cover page comments is too large to fit in the space provided, RelayFax will create an additional TIF image/page for the text, using the margin and font settings defined in this section.

The size limit for text on the cover page is governed by the following key in the `RelayFax.ini` file:

```
[Special]
CommentCutoff=3000
```

If the amount of text exceeds this value then the text is moved to its own page instead of appearing on the cover page. In any case, the client's "Comments for cover page 142" option is still limited to 3000 characters, regardless of this setting.

5.6 TWAIN Device Support

RelayFax supports TWAIN compatible devices such as digital cameras and scanners. Documents can be scanned directly into RelayFax and then faxed to their proper destinations at the touch of a button. From the RelayFax server's interface, you can acquire a document from a scanner by clicking "File»Select source...", choosing the device that you wish to use, and then clicking "File»Acquire...".

Because the scanner features are primarily accessed from within the RelayFax SMTP Client, you will find a more thorough discussion of them in the client 150 section.

See:

Scan Image 150
Scanning Options 151

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Section VI

6 Mail Sources and Rules

6.1 Mail Sources & Rules dialog

The Mail Sources and Rules dialog consists of five panes: Mail Sources, Default Rules, Outbound Fax Rules, Inbound Fax Rules, and Junk Faxes. The dialog is used to designate the location of POP3 mail hosts from which the RelayFax Server is to collect mail for faxing, and to specify what actions should be taken by the server when the collected mail meets certain administrator defined criteria. In addition, it is used to route incoming faxes to specific destinations, also based upon administrator defined criteria.

Mail Sources 82
On the Mail Sources pane, you will specify the POP3 mail hosts from which the RelayFax Server is to collect mail to be processed and faxed. RelayFax will connect to each one of these hosts, collect any waiting messages, and then process these messages based upon the criteria designated on the Rules panes of this same dialog.

Default Rules 84
When RelayFax receives a document for faxing, or if it receives an incoming fax, it will first attempt to apply the Outbound or Inbound Fax Rules specified on their respective panes. If no rule can be applied to the document or fax then RelayFax will act according to the default rules specified here.

Outbound Fax Rules 86
With the Outbound Fax Rules feature, you can setup rules that RelayFax will use to determine what to do with each email message that it receives. Careful utilization of the rules system will allow you to setup a very flexible and robust fax server system.

Inbound Fax Rules 92
Inbound Fax Rules are used to tell RelayFax where to post incoming faxes. When a fax is received, the transmitting fax device's ID is compared to the current list of Inbound Fax Rules. Then, the fax is processed and routed according to these rules.

Junk Faxes 96
One of the available actions that can be specified in the Inbound Fax Rules is the "Mark as SPAM (junk)" action. The options on the Junk Faxes pane are used to designate what will happen to messages that have been marked as SPAM.

6.2 Calling Number Display (CND) Fax Routing

RelayFax is equipped with support for routing incoming faxes based upon Calling Number Display (commonly called Caller ID) data. As with other methods of routing inbound faxes, this is accomplished by using the Inbound Fax Rule 92 editor. You will create rules specifying the text for which RelayFax will search and then the actions that will be taken when that text is or isn't found.

There are a few requirements that must be met before you will be able to route faxes based upon Calling Number Display (CND) information. First, the CND service must be

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active on the telephone line on which you receive faxes. This service is provided by your telephone company, usually for a small extra monthly charge. Also, your receiving fax modem must have support for detecting and preserving CND data so that RelayFax can acquire it, and that support must be enabled. Since CND support is not normally enabled by default for most modems, it is likely that you will need to add the appropriate command to your modem's INIT string within RelayFax. Consult your modem's user manual for the proper INIT string command that enables CND support. See Modem Properties 30 for information about editing your INIT string.

Many inexpensive modems do not have CND capability.

CND data is transmitted from the telephone company to your fax modem in a packet of information between the first and second ring. Therefore, you must configure your modem to allow at least two rings before answering the call if you want to be able to route messages based on CND data. You can configure this setting on the Modem Properties 27 dialog.

CND data can be provided to RelayFax in a variety of formats. It can be sent as a raw byte stream, in single-message format, or multi-message format. To make full use of RelayFax's CND routing capabilities you must configure your modem to provide CND data in multi-message format. Consult your modem manual for the proper INIT string settings required to achieve this (for example +VCID=1). In multi-message format most modems append "labels" to the raw CND data elements in order to make it easier to read, but there are no uniform standards governing what these labels should be. Therefore different modems use different labels for each piece of CND information. One modem, for example, might label the CND number as "NUMB=" while another would use "CALLER NUMBER:". Because RelayFax needs to know which labels your modem uses so that it can parse the number and name elements from the CND data, you will need to determine them and then enter them into the controls found on the Modem Properties dialog. You can determine them by watching for the labels in the main display during an incoming call being processed by RelayFax. Technically, RelayFax should be able to acquire the CND data in raw format (which doesn't require any labels), but experimentation has discovered that some modems modify even the raw data before passing it to RelayFax. This makes parsing at the application level inevitable.

In addition to the normal actions that can be assigned to Inbound Rules, there is one special action available for use exclusively with CND routing. Since CND detection takes place prior to answering the call, you can use the "Do no answer incoming call" action. When an incoming call is ignored as a result of such a rule the call is not answered and will ring until the remote side gives up. While the phone is ringing you may see one or more error messages such as "unspecified modem error" or "timeout during fax send/recv". These error messages are of no real concern. The presence of these error messages does not effect the performance of the software in any way.

See the "DAT File Processing Macros 198" section for information regarding CND related macros available for use within DAT files.

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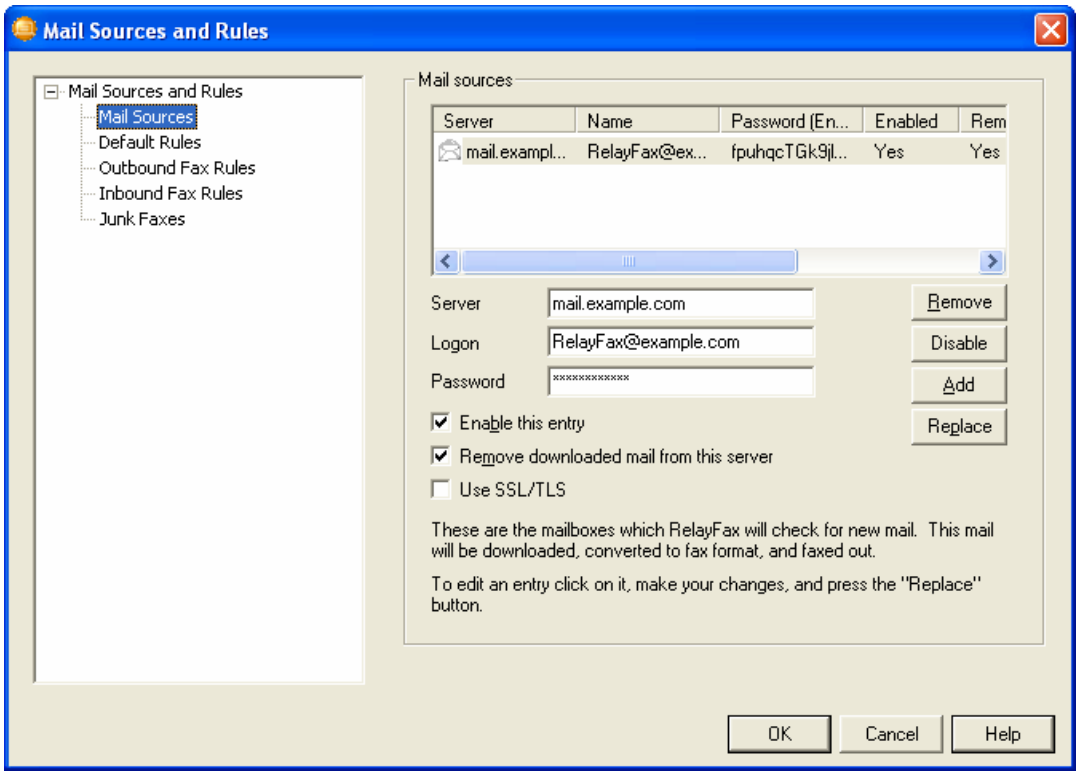
6.3 Mail Sources



Use the Mail Sources pane to specify the mail hosts from which the RelayFax Server should collect mail to be processed and faxed.

Mail Sources
Here you can specify as many mail server accounts as you wish. RelayFax will collect email from each of them, convert the emails to faxes, and then send them.

Server
Enter the server from which you wish to be collect RelayFax's messages.

Logon
Enter the username or login credential of the mail account on the specified server.

Password
Enter the password needed to access the account.

Remove
If you wish to delete a mail source, select it from the list and then click this button to remove it.

Enable/Disable
Clicking this button toggles the state of the selected mail source entries. This switch gives you control over whether RelayFax will collect mail for this entry or skip over it when it performs the mail collection process.

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Add
After entering the server and login credentials in the spaces provided, click this button to add the mail source to the list.

Replace
When an entry is selected from the list, it will be presented for editing. After any desired changes are made click this button to apply those changes.

Remove downloaded mail from this server
Enable this check box if you wish to remove the mail from the server after it is collected. Otherwise it will be left on the server.

Use SSL/TLS
Check this box if you wish to use SSL/TLS when collecting messages from the mail source.

Adding a New Mail Source

To add a new mail source to the list, enter the server and login credentials, choose whether or not to *Remove downloaded mail...*, and then click *Add*. At each designated processing interval RelayFax will check all enabled entries for new mail messages.

Editing an Existing Mail Source

To edit an existing mail source, first click the desired entry. This will display its current settings in the various controls on this dialog. Make any desired changes to these settings and then click the Replace button. The old settings for this entry will then be replaced by the new.

Do not click the Add button when editing an existing entry. Click the Replace button to save any changes to the entry.

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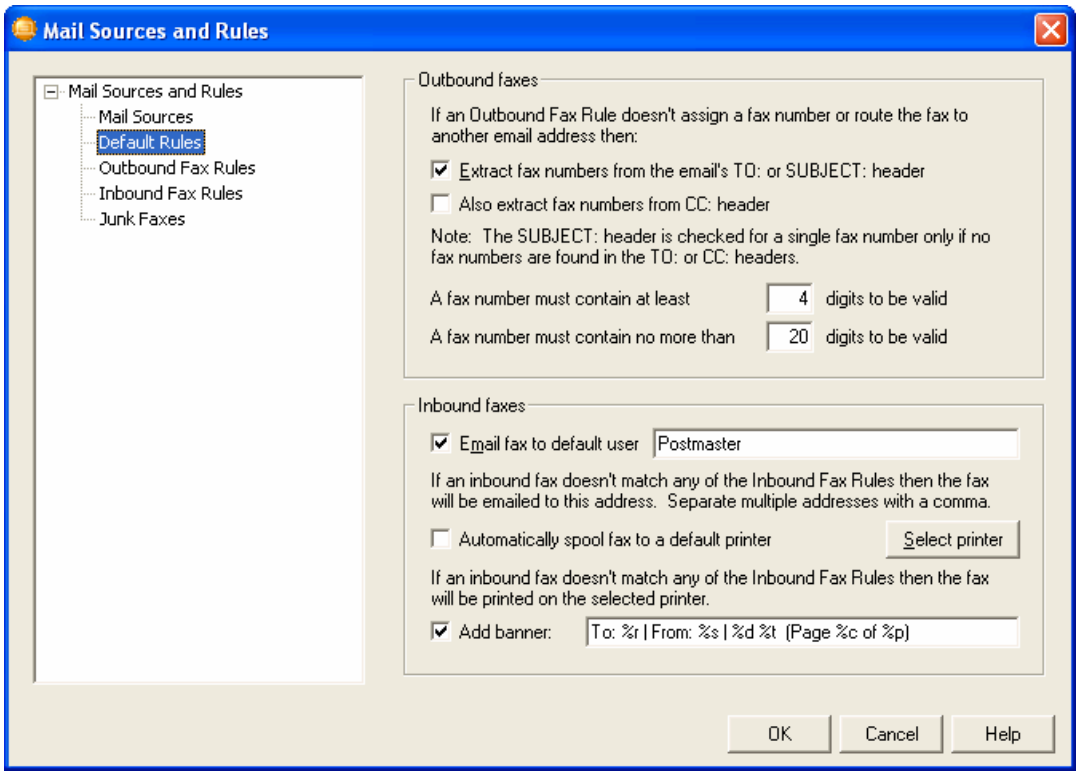
6.4 Default Rules


Mail Sources and Rules
Mail Sources and Rules
Mail Sources
Default Rules
Outbound Fax Rules
Inbound Fax Rules
Junk Faxes
Outbound faxes
If an Outbound Fax Rule doesn't assign a fax number or route the fax to another email address then:
Extract fax numbers from the email's TO: or SUBJECT: header
Also extract fax numbers from CC: header
Note: The SUBJECT: header is checked for a single fax number only if no fax numbers are found in the TO: or CC: headers.
A fax number must contain at least 4 digits to be valid
A fax number must contain no more than 20 digits to be valid
Inbound faxes
Email fax to default user Postmaster
If an inbound fax doesn't match any of the Inbound Fax Rules then the fax will be emailed to this address. Separate multiple addresses with a comma.
Automatically spool fax to a default printer
Select printer
If an inbound fax doesn't match any of the Inbound Fax Rules then the fax will be printed on the selected printer.
Add banner: To: %r | From: %s | %d %t (Page %c of %p)
OK
Cancel
Help

When RelayFax receives a document for faxing, or if it receives an incoming fax, it will first attempt to apply the Outbound 86 or Inbound 92 Fax Rules specified on their respective panes. If no rule can be applied to the document or fax then RelayFax will act according to the default rules specified here.

Outbound Faxes

Extract fax numbers from the email's TO: or SUBJECT: header
If an Outbound Fax Rule doesn't assign a fax number or route the fax message to an email address, then RelayFax will attempt to extract a fax number from the message's TO: header if this checkbox is enabled. If no numeric data is present in the TO: header (or CC: if enabled below) then the SUBJECT: header will be scanned. If no outbound rule could be applied to the message and this option is disabled (or the headers contain no fax numbers), RelayFax will send a message to the Sender informing him or her that the fax cannot be sent.

Also extract fax numbers from CC: header
If you have RelayFax configured to extract fax numbers from TO: headers and Subject, click this checkbox if you wish to extract them from CC: headers as well.

A fax number must contain at least [xx] digits to be valid
Type the minimum number of digits that any extracted numbers must contain.

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A fax number must contain no more than [xx] digits to be valid
Type the maximum number of digits that you wish to allow extracted numbers to contain. This is useful if you wish to prohibit your users from sending faxes to long distance numbers.

Inbound Faxes

Email fax to default user [*address*]
When RelayFax receives an inbound fax that does not match any of the Inbound Fax Rules, it will be emailed to this address. If entering multiple addresses they must be separated by commas.

Automatically spool fax to a default printer
Check this box if you wish to print all inbound faxes that do not match any Inbound Fax Rules. Click the Select Printer button to choose the printer that you wish to use.

Select Printer
Click this button to open the Select Printer 55 dialog from which you can choose a printer and set several options.

Add Banner
Click this option if you wish to add a custom banner to inbound faxes that do not match one of the Inbound Fax Rules. For more on banners, see: Banner Text & Formatting Characters 42.

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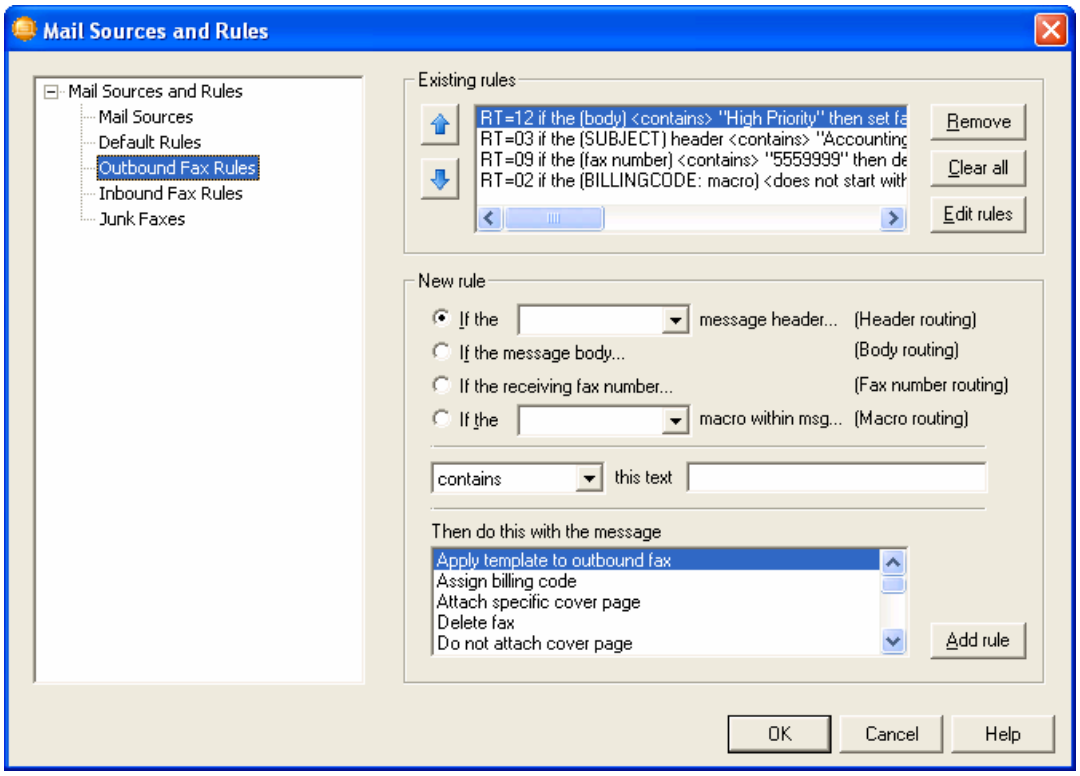
6.5 Outbound Fax Rules



With the Outbound Fax Rules feature, you can create rules that RelayFax will use to determine what to do with each email message that it receives. Careful utilization of the rules system will allow you to create a very flexible and robust fax server system.

Fax Rules are processed in order and are cumulative. For example, if RelayFax receives a message from User@RelayFax.com and you have a rule that states: "If [FROM] contains 'User' then fax to {555-5555}", and you have a later rule that says "If [FROM] contains 'RelayFax.com' then fax to {555-1234}", then both rules would be applied and the message would be faxed to both numbers.

In some cases, you may not want all possible rules to be applied to a message. RelayFax provides the "Skip next rule" and "Stop processing rules" actions for such situations. In the example above, if you did not want messages containing "User" to have more than the first rule applied to them, you could create a rule immediately following the first which would say "If [FROM] contains 'User' then stop processing rules". Then the rule stating, "If [FROM] contains 'RelayFax.com' then send to..." would not be applied to the message.

Existing Rules
This box displays your current list of rules.

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UP/DOWN Arrows
Because rules are processed in order, changing a rule's position in the list can alter when or if it is applied to a given message. To change a rule's position, select its entry and this click the up or down arrow to move it.

Remove
If you wish to delete an outbound rule, select it and then click *Remove* to delete it from the list.

Clear all
This button removes all existing rules.

Edit rules
If this button is clicked, the `OUTRULES.DAT` file will be opened in Notepad for manual editing of Outbound Fax Rules.

Take care not to violate the syntax of the `OUTRULES.DAT` file.

New Rule

Header routing

If the [HEADER] message header...
Click this option if you want the fax rule to route messages based on the text in a specific message header.

Body routing

If the message body...
Click this option if you want the fax rule to route messages based on the text in the message body.

Fax number routing

If the receiving fax number
Click this option if you want the rule to be based on the fax number to which the fax is being sent.

Macro routing

If the [xx] macro within msg...
When this option is chosen, the fax rule's routing will be based on the presence of certain email macros found within the message body.

For more information regarding email macros, see:

Sending a Fax via an Email Client 158

Email Macros 192

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Comparison type

contains, does not contain, does not start with, is equal to, is not equal to, starts with
This option is for designating what relationship should exist between the part of the message being searched and the "*this text*" value designated for the rule.

this text
Use this field to specify the text that RelayFax should look for, which will trigger the rule when a match is found or not found, depending on the rule.

Action

Then do this with the message
This box lists the available actions that can be performed if a received message meets an Outbound Fax Rule's criteria. When creating a rule, the types of actions that will be available depends upon which routing method you select above. Not all actions are available for all routing types. The following is a list of the actions and their functions:

Add text to end of fax number - This option allows you to add text to the end of a fax number if it meats the rules criteria. This action is only available when you choose the *Fax number routing* method.

Add text to start of fax number - This option allows you to add text to the beginning of a fax number if it meats the rules criteria. This action is only available when you choose the *Fax number routing* method.

Apply template to outbound fax - Use this option if you want a specific Template 118 to be applied to messages meeting an Outbound Fax Rule's criteria. With Templates you can designate alternate banners, cover pages, and other fax parameters. To create a rule that will take this action specify the routing type, comparison type, and text to be tested. Then, click the *Apply template to outbound fax* action, click the *Add rule* button, choose the template file (*.TP) that you want to assign to the rule, and then click *OPEN*.

Before you can create a rule that will take this action you must first create the Template that you wish to assign to the rule.

For more information on Templates, see:

Templates 118

Assign Billing Code - Use this action to assign a specific Billing Code to an outbound fax meeting the rule's criteria. When you click the *Add rule* button, a dialog will open from which you can choose the desired Billing Code or create a new one.

Attach specific cover page - Use this feature if you want an alternate Cover Page 106 to be attached to messages that match a rule's criteria. To create a rule that will take this action specify the routing type, comparison type, and text to be tested. Then click the *Attach specific cover page*

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action, click the *Add rule* button, choose the cover page file that you want to assign to the rule, and then click *OPEN*.

Before you can create a rule that will take this action you must first create the alternate Cover Page that you wish to assign to the rule.

For more information on cover pages, see:

Cover Pages 106

Do not attach cover page – Select this action if you wish to prevent a cover page from being attached to the outbound fax when the fax message matches the rule's criteria.

Delete fax – Select this action if you want the message to be deleted if it matches the rule.

Email fax to sender – Using this rule will cause any outbound fax matching the rule's criteria to be emailed to the sender of the fax message.

Email fax to specific user(s) - Select this action, click the *Add rule* button, enter one or more Email addresses into the dialog that will open (clicking *Add* after each address entered), and then click OK. This will cause RelayFax to forward any message that meets the specified Rule's requirements to the addresses indicated in the Rule.

Several special formatting macros are available for use in specifying these email addresses. See the Outbound Fax Rule Macros 197 for a complete listing.

Print fax to specific printer – Select this action, click the *Add rule* button, and then the Select Printer 55 dialog will be opened. Choose a printer from the Available Printers list and then click OK. This will cause all outbound faxes that meet the rule's criteria to be sent to the selected printer.

Run a program - This action can be used to run a particular program when an outbound fax message meets the rule's conditions. You must specify the path to the program that you wish to run, and you can specify whether or not RelayFax should suspend its operations temporarily or indefinitely while it waits for the program to terminate. Further, you can force the program to terminate and/or run it in a hidden window.

Replace text within fax number - Use this action if you want to replace the specified text in a fax number with some other text when it meets the rule's criteria. When you choose this option and click *Add rule*, a box will open in which you will specify the new text. This action is only available when you choose the *Fax number routing* method.

Send fax at specific day and time – Select this action, click the *Add rule*

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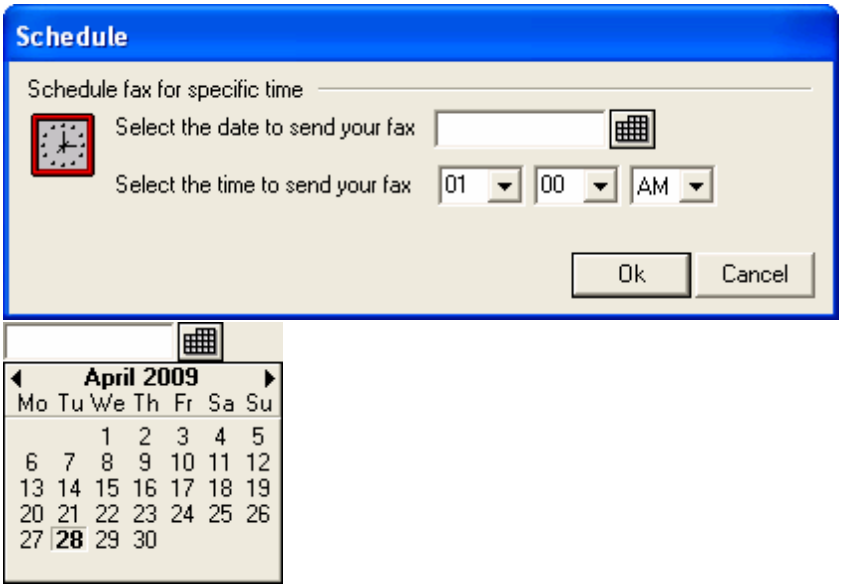
button, and then choose the date and time that you want a fax matching the rule to be sent.


Schedule
Schedule fax for specific time
Select the date to send your fax
Select the time to send your fax
01
00
AM
Ok
Cancel
April 2009
Mo Tu We Th Fr Sa Su
1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28 29 30

Click to open the graphical calendar from which you can choose the date to send the fax.

Send fax to numbers found in text file - Select this action, click the *Add rule* button, and then pick the text file that contains your list of fax numbers. When this rule is triggered RelayFax will fax the message to each number specified in the file. The file must contain no more than one fax number per line, but each line can also contain the recipient's name and company information. Lines beginning with "#" or ";" are ignored to allow you to put comments throughout the file as necessary.

Examples:

`555-1212`	-only the fax number is specified
`555-1212, Arvel Hathcock`	-fax number and recipient name specified
`555-1212, Arvel Hathcock, Alt-N Technologies`	-fax number, name, and company specified
`555-1212, Arvel Hathcock, "Alt-N Tech, LTD."`	-fax params may contain commas if quoted
`555-1212, , Alt-N Technologies`	-only fax number and company specified

There is no theoretical limit to the quantity of fax numbers that such a file can contain. However, RelayFax

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sets an arbitrary limit of 100 numbers to keep from draining the computer of too many resources. If this limit is too low, it can be adjusted by manually editing the RelayFax.ini file under the following key:

```
[Special]
MaxNumbersFromFile=100.
```

Send fax to specific number - Select this action, click the *Add rule* button, and then enter one or more fax numbers into the dialog that will open (clicking *Add* after each fax number entered), and then click *OK*. This will cause RelayFax to fax any message that meets the specified rule's requirements to the fax numbers indicated in the Rule. The dialog that opens in response to this command will also allow you to specify the recipient's name and company information.

Set the priority level for this fax – Select this action, click the *Add rule* button, and then specify the priority value (0-100) that you want to be assigned to faxes matching this rule. "0" is the highest priority and "100" is the lowest. Faxes are always sent in the order of their priority setting

Send fax using a specific fax port – Select this action, click the *Add rule* button, and select a port value from the dialog that will open. This will cause RelayFax to send any fax that meets the specified Rule's criteria through a certain com port.

Strip text from fax number(s) – This action is only available in rules using *Fax Number Routing*. It will cause the specified text to be stripped from the recipient fax number before RelayFax attempts to send the fax. Choosing the "contains" qualifier will cause the text to be stripped from the number anywhere that it occurs. Use the "starts with" qualifier if you want to strip this text from only the beginning of fax numbers. For example, you could use this action combined with the "starts with" qualifier to cause a certain unnecessary area code to be removed from the beginning of any fax number in which it appears.

Skip next rule – Use this rule to skip over the next rule.

For example,

You could have two rules which read:

```
"If From contains 'RelayFax.com' then send to UserA@example.com"
"If Subject contains 'Private' then send to UserB@example.com"
```

If a message arrives from "Someone@RelayFax.com" it will match to the first rule. If it has the word "Private" in the subject it will also match the second rule. This will result in the fax being emailed to both addresses (both UserA and UserB).

But, if you wish to send messages matching the first rule to only the first address, you could insert a new rule between the first two like this:

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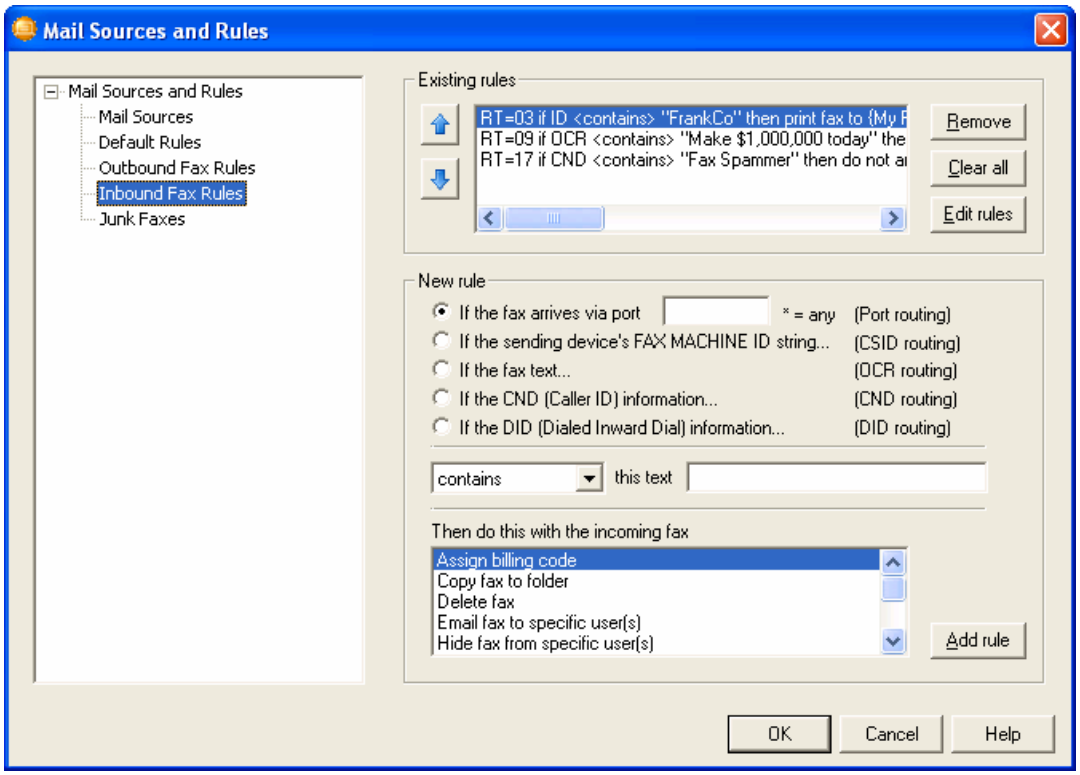
```
"If From contains 'RelayFax.com' then send to UserA@example.com"
"If From contains 'RelayFax.com' then skip next rule"
"If Subject contains 'Private' then send to UserB@example.com"
```

This would prevent the message from being sent to UserB if it was from someone at RelayFax.com.

Stop processing rules - Use this rule to cause further rule processing to stop for this message.

Add Rule
After choosing an action from the list under *Then do this with the message*, click the *Add rule* button to proceed with the rule creation process.

6.6 Inbound Fax Rules



Inbound Fax Rules are used to tell RelayFax how to handle incoming faxes. When a fax is received, the transmitting fax device's ID, the port on which the fax arrived, and the OCR results of its contents are compared to the current list of Inbound Fax Rules. If a match to one or more rules is made then the fax will be routed accordingly. Otherwise, the fax will be handled according to the settings on the Default Rules 84 pane.

Existing Rules
The Existing Rules list box shows you a list of all rules that are currently in use.

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UP/DOWN Arrows
Because rules are processed in order, changing a rule's position in the list can alter when or if it is applied to a given message. To change a rule's position, select its entry and this click the up or down arrow to move it.

Remove
If you wish to delete an inbound rule, select it and then click *Remove* to delete it from the list.

Clear all
This button removes all existing rules.

Edit rules
If this button is clicked the `INRULES.DAT` file will be opened in Notepad for manual editing of Inbound Fax Rules.

Take care not to violate the syntax of the `INRULES.DAT` file.

New Rule

Port routing

If the fax arrives via port xx
Click here and specify a port if you wish to base your rule on the COM port on which the fax arrives. Use the "*" wildcard in this space if you wish the rule to apply to all ports rather then a specific one.

CSID routing

If the sending device's FAX MACHINE ID string...
Click here to base your rule on the Call Subscriber Identification of the fax device that is sending the incoming fax.

OCR routing

If the fax text...
Click this option if you wish to base the rule on the results of the OCR process. RelayFax will recognize the document and then compare its contents to the inbound rules that you have created. For example: if you created a rule that said "...if OCR contains 'Make money today!' then delete fax", then all incoming faxes in which RelayFax found the typewritten phrase 'Make money today!' would be deleted. See OCR Options 73 for more information on routing faxes automatically by using RelayFax's OCR features.

CND routing

If the CND (Caller ID) information...
Click this option if you wish to base the rule on the incoming CND information. See Calling Number Display (Caller ID) Fax Routing 80 for more information on using CND routing.

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DID routing

If the DID (Direct Inward Dialing) information...
Click this option if your system supports Direct Inward Dialing (DID) and you wish to base the rule on the number that the sending fax device dialed.

Comparison type

contains, does not contain, does not start with, is equal to, is not equal to, starts with
This option is for designating what relationship should exist between the element of the fax being examined and the "*this text*" value designated for the rule.

this text
Use this field to specify the text that RelayFax should look for, which will trigger the rule when a match is found or not found, depending on the rule.

Action

Then do this with the incoming fax
This box lists the available actions that can be performed if an inbound fax meets an Inbound Fax Rule's criteria. When creating a rule, the types of actions that will be available depends upon which routing method you select above. Not all actions are available for all routing types. The following is a list of the actions and their functions:

Assign billing code - This action will assign a specific billing code to Inbound Faxes matching the rule's criteria.

Copy fax to folder - This action will cause the fax to be copied to a specific folder.

Delete Fax - This action will simply delete the incoming fax.

Email fax to specific user(s) - Select this action, click the *Add rule* button, enter one or more Email addresses into the dialog that will open (clicking *Add* after each address entered), and then click OK. This will cause RelayFax to email any fax that meets the specified Rule's requirements to the addresses indicated in the Rule. A rule of this type will be created automatically when an incoming fax is routed to someone via email and he or she clicks the "*To route future faxes from [sender] to someone else...*" link included by default in the message. See the $INCLUDEURL$ Macro description in DAT File Processing Macros 198 for more information.

Hide fax from specific user(s) - This action will prevent a fax that matches the rule from being delivered to the specified user. A rule of this type will be created automatically when an incoming fax is routed to someone via email and he or she clicks the "*To ignore future faxes from [sender]...*" link included by default in the message. See the $INCLUDEURL$ Macro description in DAT File Processing Macros 198 for more information.

Mark fax as SPAM (junk) - This action marks the inbound fax as SPAM (a junk fax). Use the options on the Junk Faxes 96 pane to specify what should be done with messages that are marked as SPAM. A rule of this type will be

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created automatically when an incoming fax is routed to someone via email and he or she clicks the "*To mark future faxes from [sender] as unwanted spam...*" link included by default in the message. See the $INCLUDEURL$ Macro description in DAT File Processing Macros 198 for more information.

Print message to specific printer - Select this action, click the *Add rule* button, and then the Select Printer dialog will be opened. Choose a printer from the Available Printers list and then click OK. This will cause all inbound faxes that meet the rule's criteria to be sent to the selected printer.

Run a program - This action can be used to run a particular program when an incoming fax meets the rule's conditions. You must specify the path to the program that you wish to run, and you can specify whether or not RelayFax should suspend its operations temporarily or indefinitely while it waits for the program to terminate. Further, you can force the program to terminate and/or run it in a hidden window.

Skip next rule - Use this option to skip over the next rule.

For example,

Suppose you have two rules which read:

```
"If ID contains '123' then send to UserA@example.com"
"If ID contains '456' then send to UserB@example.com"
```

If an inbound fax arrives from a device with the ID '123456' then it will be routed to two different users (UserA and UserB).

But suppose you inserted a new rule between the first two like this:

```
"If ID contains '123' then send to UserA@example.com"
"If ID contains '123' then skip next rule"
"If ID contains '456' then send to UserB@example.com"
```

This would prevent the fax from being sent to UserB if it was from '123456'.

Stop processing rules - Use this rule to stop further rules processing for the message.

Use specific OCR language - Tells RelayFax to use the language you specify to recognize the characters in the OCR engine.

Add rule
After making a selection from the *Then do this with the incoming fax* list, click the *Add rule* button to proceed with the rule creation process.

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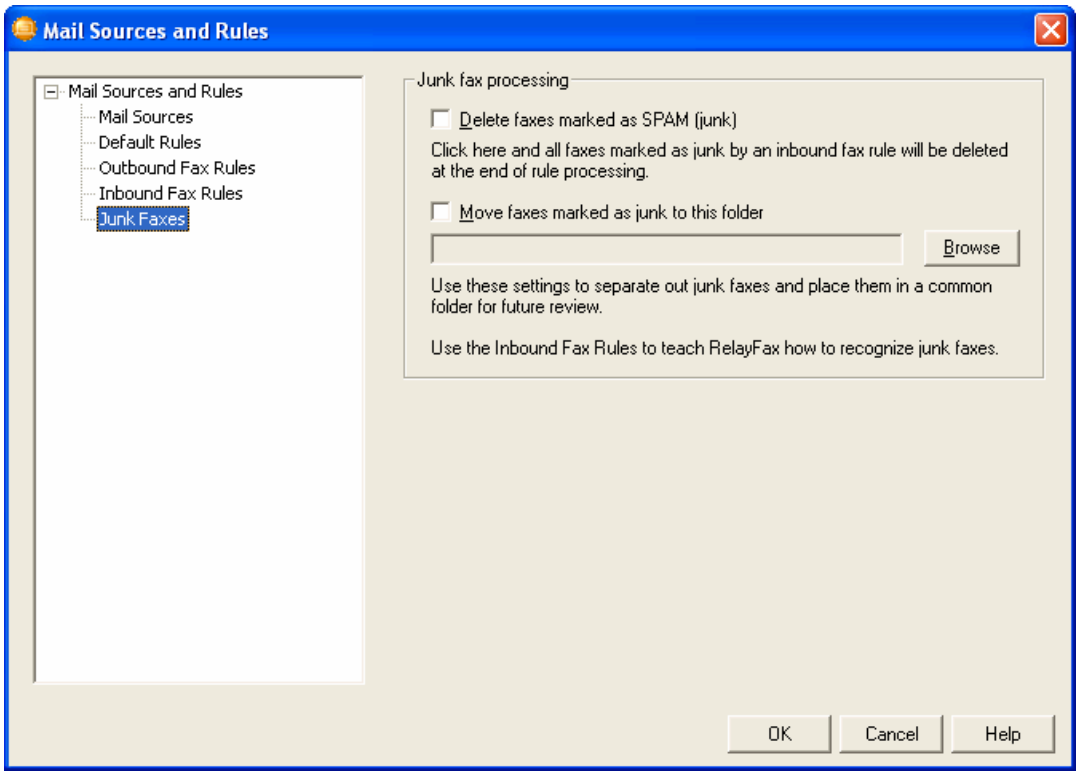
6.7 Junk Faxes


Mail Sources and Rules
Mail Sources and Rules
Mail Sources
Default Rules
Outbound Fax Rules
Inbound Fax Rules
Junk Faxes
Junk fax processing
Delete faxes marked as SPAM (junk)
Click here and all faxes marked as junk by an inbound fax rule will be deleted at the end of rule processing.
Move faxes marked as junk to this folder
Browse
Use these settings to separate out junk faxes and place them in a common folder for future review.
Use the Inbound Fax Rules to teach RelayFax how to recognize junk faxes.
OK
Cancel
Help

One of the available actions that can be specified in the Inbound Fax Rules 92 is the "Mark as SPAM (junk)" action. The options on the Junk Faxes pane are used to designate what will happen to messages that have been marked as SPAM. You can choose to delete them or move them to a specific folder.

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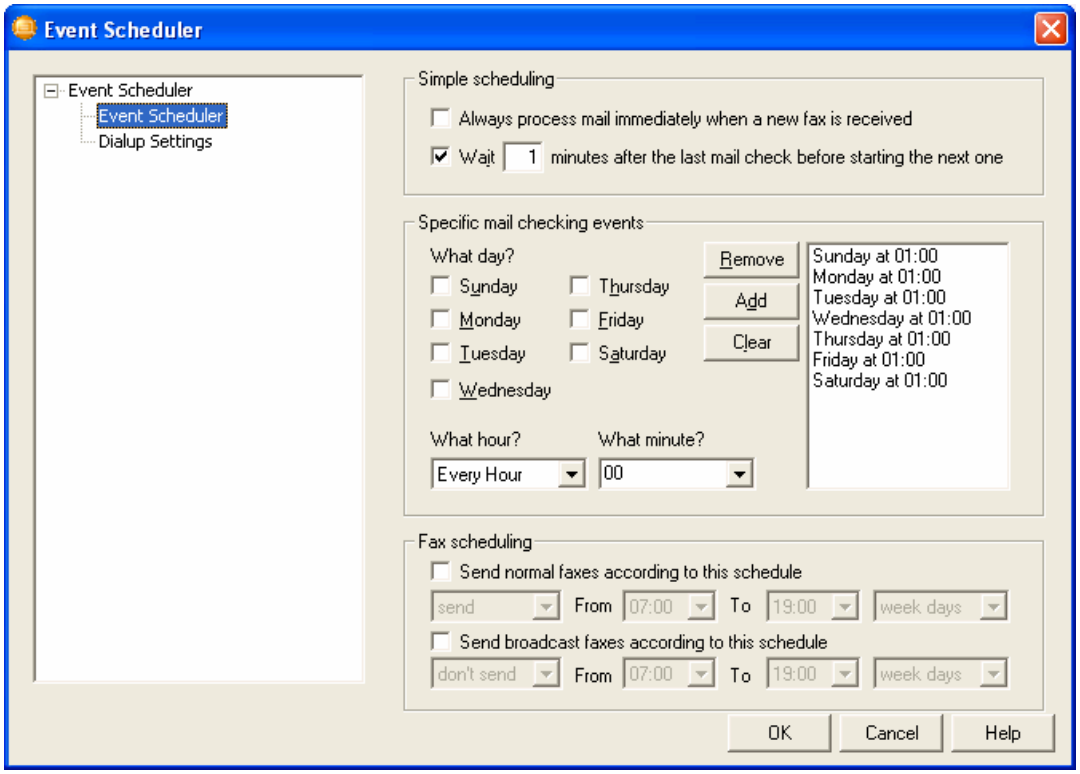
Section VII

7 Event Scheduler

7.1 Event Scheduler



The scheduling system in RelayFax allows you to specify exactly when and how often you want new mail to be collected and waiting outbound mail to be forwarded. It also provides some control over when normal and broadcast faxes are sent. You can designate a window in which RelayFax will or will not send either type of fax.

Simple Scheduling

Always process mail immediately when a new fax is received
Enable this check box and RelayFax will initiate a mail transaction with the server each time a new fax is received. This will allow the fastest delivery of newly received faxes.

Wait [xx] minutes after the last mail check before starting the next one
Using this Simple Scheduling feature you can configure RelayFax to begin processing every time a designated number of minutes has elapsed. This countdown begins at the conclusion of any mail processing event no matter what caused the event to be triggered.

In order for Simple Scheduling to take effect during any given day, at least one timed entry must exist for that day in the list of specifically scheduled times. This makes it possible for you

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to use simple scheduling but still limit faxing to specific days.

For example,

If you want to schedule 45 minutes between dialup sessions but only on Monday through Friday. You will need to enable the Simple Scheduling option and enter 45 minutes into the control. Then you must enter at least one scheduled time for each day (Monday, Tuesday, Wednesday, Thursday, and Friday). Since there wouldn't be a scheduled time for Saturday or Sunday, those days would be exempt and no mail processing event would be triggered by Simple Scheduling. The time you select when you setup your trigger days doesn't matter. Simple Scheduling only checks whether or not an entry for any particular day exists.

Specific Mail Checking Events
Using this method, you can designate exact times that you wish RelayFax to begin Mail Checking Events.

What day?
Select the days that you wish to schedule.

What hour?
Select the hour that you wish to schedule.

What minute?
Select the minute that you wish to schedule.

Remove
If you wish to delete an entry from the list, select it and then click this button.

Add
Once you've selected the day, hour, and minute, click this button to add the time to the list of scheduled events.

Clear
This button removes all entries from the schedule listing.

Fax Scheduling
Use the options in this section to schedule a daily window of time in which faxes may or may not be sent by RelayFax. You can specify a separate time-period for both normal and broadcast faxes 178, whether the period is to allow or disallow sending faxes, and whether or not it will be applied every day or just weekdays (Monday thru Friday).

Send normal faxes according to this schedule
Click this option to set a time window for all normal (i.e. non-broadcast) faxes. Choose "*send*" in the first drop-down box if you wish to allow RelayFax to send faxes during the scheduled time. Choose "*don't send*" if you wish to disallow the sending of

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faxes during that period. Designate the starting and ending hour, and then choose "*every day*" if you wish the period to be enforced every day or "*weekdays*" if you wish the scheduled period to be enforced only Monday thru Friday.

Send broadcast faxes according to this schedule
Click this option to set a time window for all broadcast faxes. Choose "*send*" in the first drop-down box if you wish to allow RelayFax to send broadcast faxes during the scheduled time. Choose "*don't send*" if you wish to disallow the sending of broadcast faxes during that period. Designate the starting and ending hour, and then choose "*every day*" if you wish the period to be enforced every day or "*weekdays*" if you wish the scheduled period to be enforced only Monday thru Friday.

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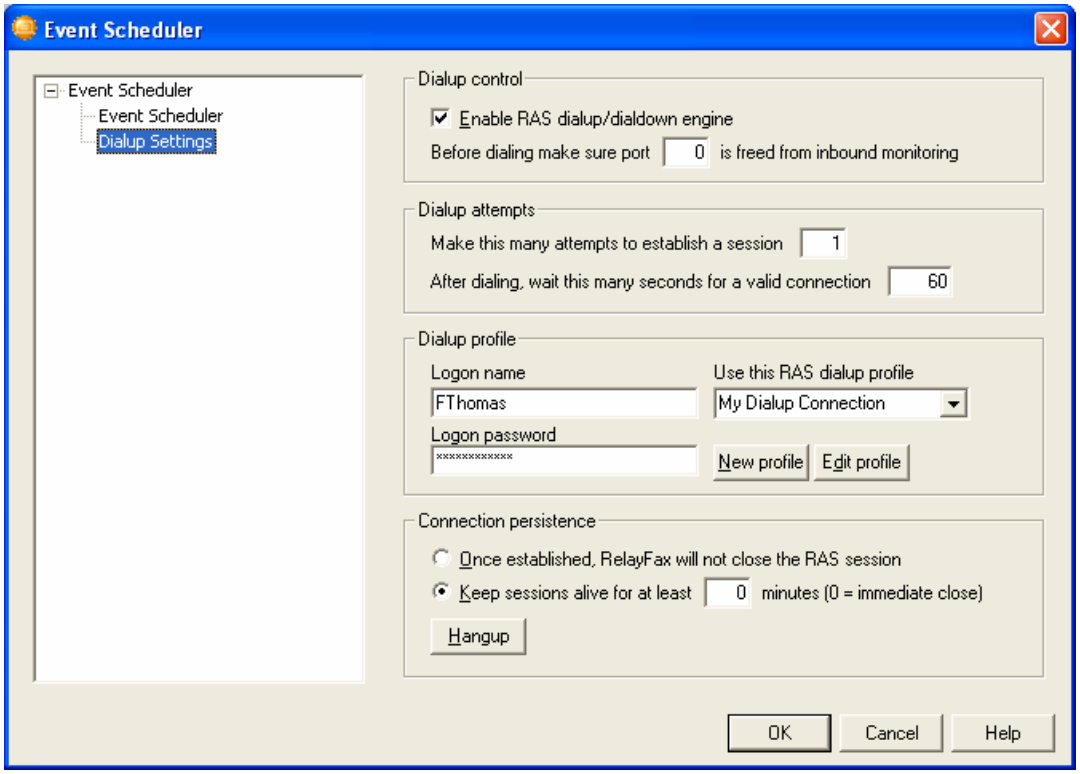
Section VII

8 Dialup Settings

8.1 Dialup Settings



RelayFax can dial your ISP for you in order to collect mail from and post mail to remote mail servers. The Dialup Settings dialog controls this feature.

Dialup Control

Enable RAS dialup/dialdown engine
Check this box to enable the dialup feature.

Before dialing make sure port [xx] is freed from inbound monitoring
By specifying the port on which you have a fax device listening for incoming faxes, RelayFax can suspend listening temporarily in order to use that port for dialup. This aids in avoiding hardware conflicts.

Dialup Attempts

Make this many attempts to establish a session
RelayFax will attempt to connect to the remote host this many times before giving up.

After dialing, wait this many seconds for a valid connection
This value determines how long RelayFax will wait for the remote host to answer and complete the RAS connection.

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Dialup Profile

Logon name
The value specified here will be passed to the remote host during the authentication process.

Logon password
The value specified here will be passed to the remote host during the authentication process.

Use this RAS dialup profile
This drop-down list box allows you to select a session profile that has been previously defined through Windows Dialup Networking or Remote Access Services setup.

New profile
Click this button to create a new Dialup Networking or Remote Access Services profile.

Edit profile
Click this button to edit the currently selected Dialup Networking or Remote Access Services profile.

Connection Persistence

Once established, RelayFax will not close the RAS session
By default, RelayFax will shut down a created connection immediately after all mail transactions have been completed, and the session is no longer needed. Selecting this option will allow the session to remain active even after all mail has been transacted.

Keep sessions alive for at least XX minutes (0=immediate close)
If enabled, this option will allow a RelayFax created RAS session to survive for the number of minutes specified. Placing a zero in this entry will cause the connection to be immediately closed after the transactions are completed.

Hang-up
This button will break the connection to the ISP. This button is active only if RelayFax has initiated the RAS session.

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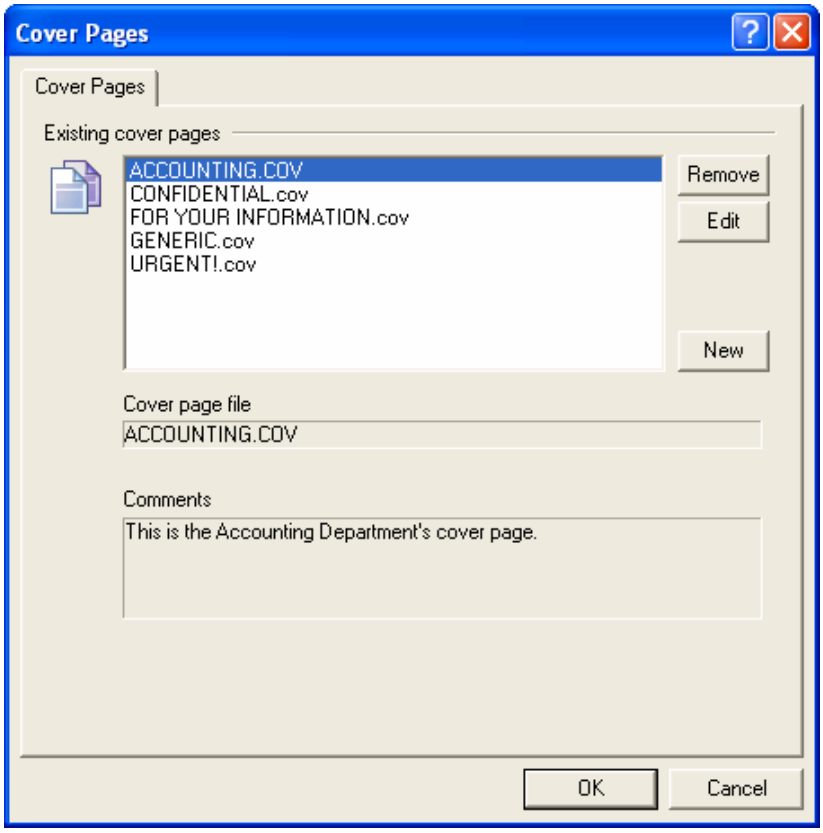
Section

9 Cover Pages

9.1 Cover Pages



RelayFax integrates with the Microsoft Cover Page Editor application that ships with Windows. This application provides a very high level of custom cover page design and creation capability. The Microsoft Cover Page Editor allows you to create and edit richly formatted cover pages which are supported directly by RelayFax.

RelayFax uses the Microsoft Cover Page Editor included with the Microsoft Windows XP, 2000, 2003, Vista, and 2008, excluding XP Home and Vista Home. If the cover page editor is not installed or associated with these files then you may need to go to Add/Remove Programs in the control panel and install the Fax Services (also known as "Windows Fax and Scan") under Add/Remove Windows Components.

Although the RelayFax SMTP Client can be installed and used on the Home editions of Windows XP and Vista, the cover page options will not work because those versions of the operating system do not include the fax services.

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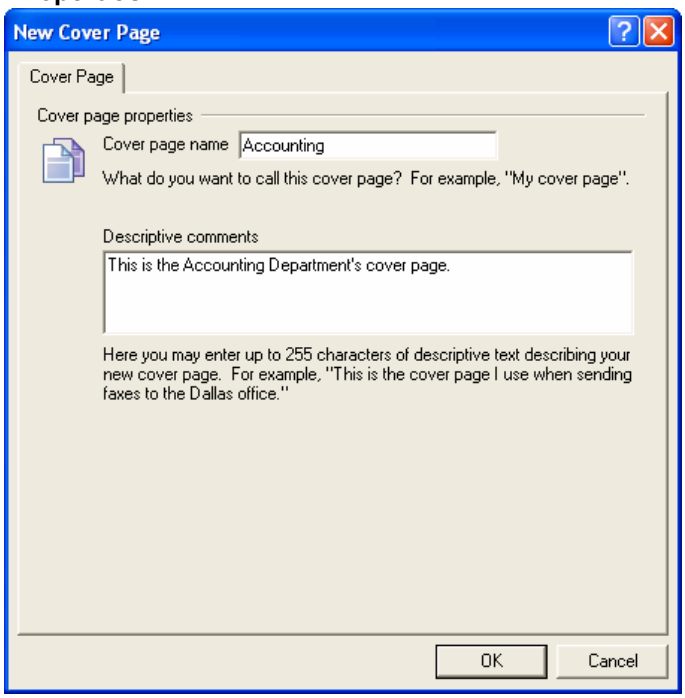
Existing Cover Pages
This box displays all available cover pages that you have created.

Remove
You may delete a cover page by selecting it from the Existing Cover Pages list and then clicking the Remove button. RelayFax will ask you to confirm your decision to delete the cover page before proceeding.

Edit
To edit a previously created cover page select it from the Existing Cover Pages list and then click the Edit button. The cover page will be loaded into the Microsoft Cover Page Editor. For more information on using the Cover Page Editor, click "Help»Help Topics" within the editor.

New
To create a new cover page, click the New button. This will open the Cover Page Properties dialog, on which you will assign a name for your cover page, and include any desired comments or notes about this page for your reference.

Cover Page Properties


New Cover Page
Cover Page
Cover page properties
Cover page name
Accounting
What do you want to call this cover page? For example, "My cover page".
Descriptive comments
This is the Accounting Department's cover page.
Here you may enter up to 255 characters of descriptive text describing your new cover page. For example, "This is the cover page I use when sending faxes to the Dallas office."
OK
Cancel

Cover page name
Type a name for your cover page into this text box. This may be a descriptive name such as "The Frank Thomas cover page".

Descriptive Comments
Here you may enter up to 255 characters of descriptive text or comments regarding this cover page. This can be used for reference to easily identify a specific cover page. This is helpful when creating Outbound Fax Rules to

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assign alternate cover pages. For example, "This is the cover page that Frank Thomas uses when sending faxes about his many heroic exploits." When this particular cover page is selected from the Existing Cover Pages list this text will appear in the Comments section of the Cover Pages dialog.

These comments are saved in your cover page folder as the file "<Cover Page Name>.cmt".

Cover page file:
This is the filename of the cover page. Cover pages are stored in the `...\RelayFax\Covers` subfolder.

Comments:
When you create a cover page you will have the opportunity to include some comments or a description of the page for your personal reference. These comments will appear in this area when a cover page is selected from the Existing Cover Pages list. This text will not appear on the cover page itself.

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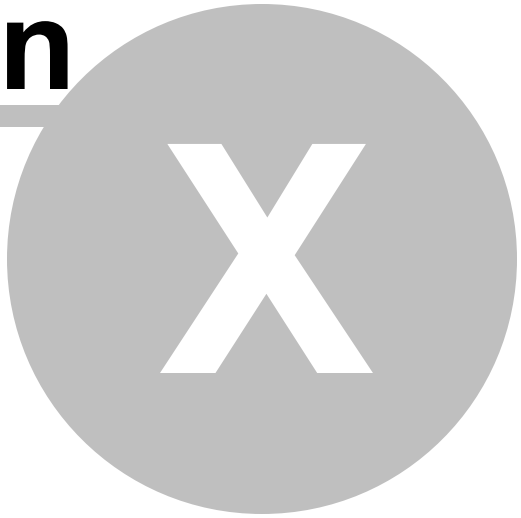
Section



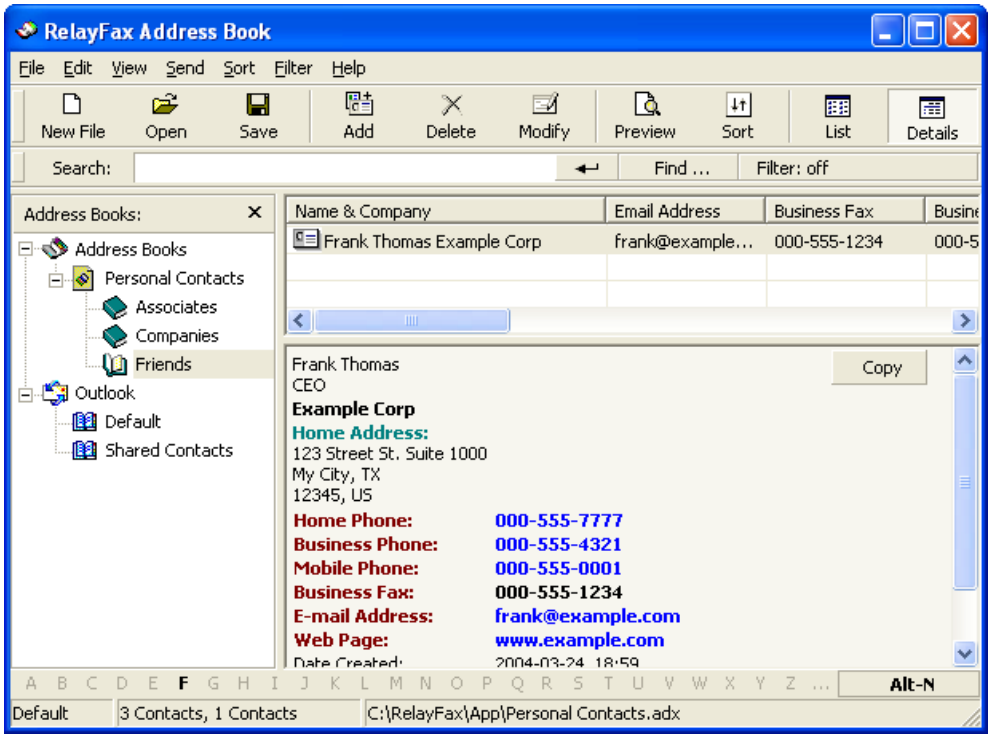
10 Contact Manager

10.1 Contact Manager

RelayFax and the RelayFax SMTP Client are each equipped with integrated support for two contact management systems. You can choose to use either Windows Address Book (WAB) or the included Address Express (Address Ex) as your default contact manager. WAB is enabled by default, but if you wish to use Address Ex then you can change this setting on the Logs and Contacts 53 pane of the RelayFax Properties dialog. To open the default contact manager, click "Tools » Fax contacts..." or click the Fax contacts icon on the toolbar.

Address Express can be used to manage all of your contacts, and supports storing a large amount of information for each one. You can add up to 50 fields for each contact, assign contacts to groups, add notes for them, sort by any field, launch your web browser, phone dialer, or email program, and a host of other features.

For more information regarding the various features and options available within either WAB or Address Ex, see their respective online Help systems.



See also:

Logs and Contacts 53

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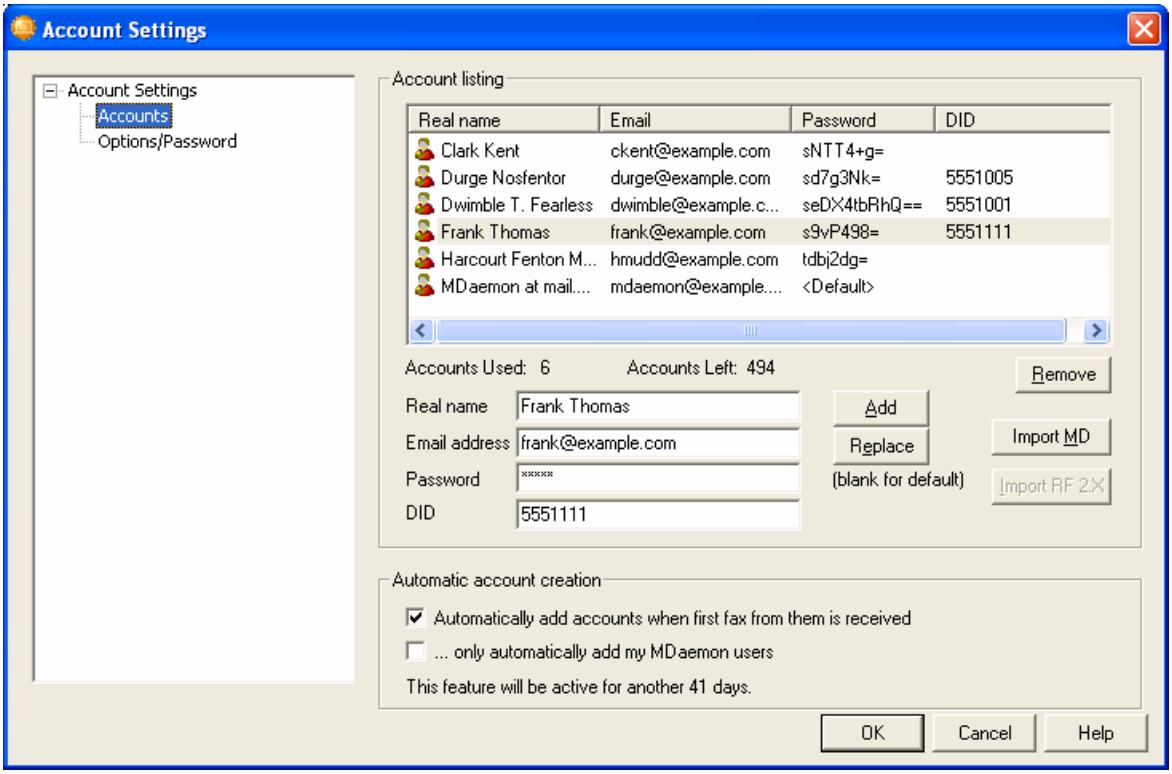
Section

11 Account Settings

11.1 Accounts



Account Listing
This display lists the names and email addresses of every user that has been granted permission to send faxes via RelayFax. It also displays an encrypted version of each user's fax password or "<Default>" if a specific password hasn't been assigned, and any Direct Inward Dialing (DID) number assigned to the user. The number of entries allowed in the listing is determined by the particular license that you have purchased for RelayFax. The listing can also be sorted by any of the available fields: Real name, Email, Password, and DID. To sort the list, click the heading that you want it to be sorted by. Clicking the same heading again will cause the list to alternate between an ascending or descending sort order.

Accounts used:
This is the number of addresses that currently have permission to use the RelayFax Server.

Accounts left:
This is the number of addresses still available before your RelayFax license key reaches its maximum.

Remove
To delete an entry from the Address Listing, first click the desired entry and then

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this button.

Real name
Type the user's real name into this field.

Email address
Type the user's email address. The user's message must be sent from this address or RelayFax will not fax it.

Password
If you specify a password in this field then the user must include it in his message for RelayFax to fax the message. In the RelayFax SMTP Client there is a specific control used for including the user's password, but if they send their message via a regular email client then they must include the "FAXPASSWORD:pass" macro in the body of their message. Leaving the Password field blank will set the user's password to "<default>". If no default password has been designated on the Options/Password 114 pane then no password will be required in their messages. If there has been a password designated then they must include it in their message in the same way that a user-specific password would be included.

DID
If you are using a Direct Inward Dialing (DID) system, and the user has a DID fax number assigned to him or her, enter that number here.

Add
Click this button to add the user to the list after entering their information.

Replace
When you click an entry in the list of accounts its information will be displayed in the fields below the listing. If you edit that information then click this button to update the entry in the listing.

Import MD
If your local mail server is an MDaemon Email Server then you may click this button to automatically import your MDaemon users into RelayFax.

Import RF 2.X
Before version 3, RelayFax used a different format for its user listing. Click this button if you used one of these very early versions of RelayFax and wish to import its user listing.

Options

Automatically add accounts when first fax from them is received
When this switch is enabled, RelayFax will automatically add a new address to the list of accounts in the Address Listing whenever the first fax from it is received. This makes it possible to dynamically build your list of users.

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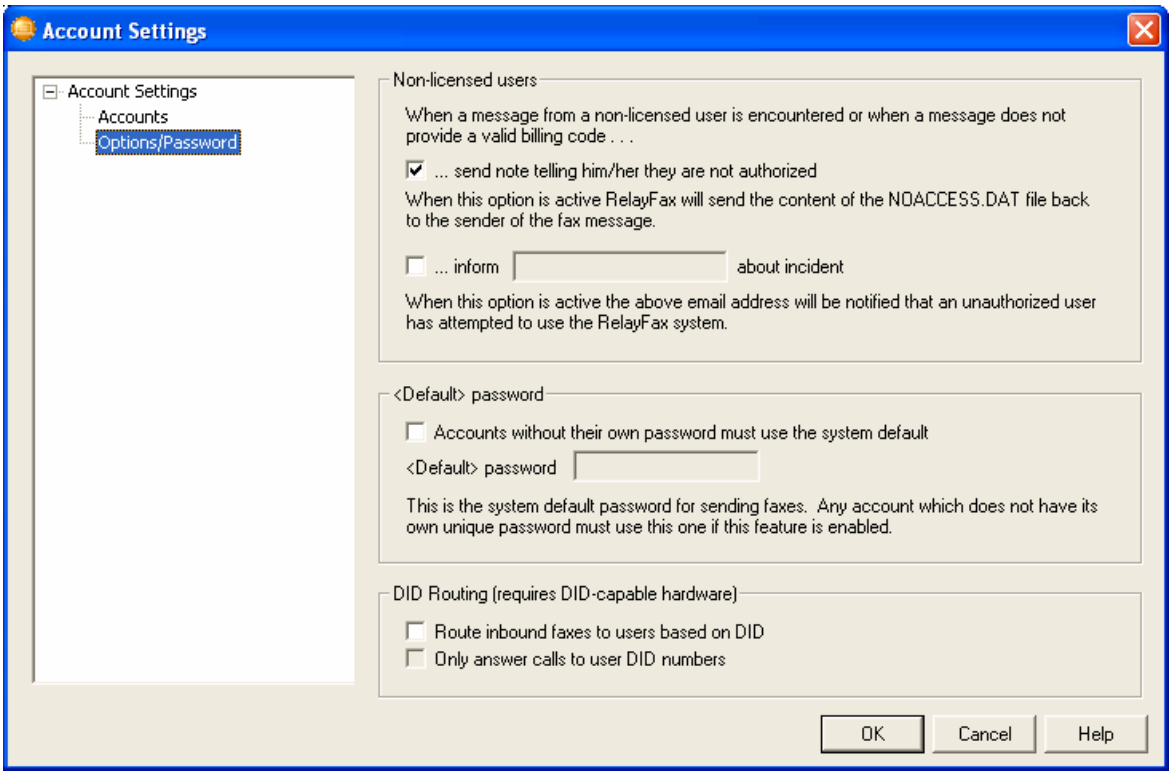
When using this feature, RelayFax will accept messages from anyone until the maximum number of accounts has been reached. If you wish to limit or control permissions to your RelayFax Server, do not use this feature; disable this checkbox and then manually enter those addresses that you wish to grant permission to use your RelayFax Server.

This feature can be enabled/disabled in only the first 60 days of a RelayFax Server's lifespan; after that time this feature is permanently disabled. Below this control is a counter letting you know how many days you have left. Only in unlimited user license versions of RelayFax will this feature be permanently usable.

...only automatically add my MDaemon users
If you are using MDaemon as your local email server then click this checkbox if you want the *Automatically add accounts...* feature to apply only to your MDaemon users. Non-MDaemon users will not be added. New installations will not have to duplicate your MDaemon users. RelayFax will use MDaemon's account database up to the maximum number of users allowed by your RelayFax license.

11.2 Options/Password


Account Settings
Account Settings
Accounts
Options/Password
Non-licensed users
When a message from a non-licensed user is encountered or when a message does not provide a valid billing code . . .
... send note telling him/her they are not authorized
When this option is active RelayFax will send the content of the NOACCESS.DAT file back to the sender of the fax message.
... inform
about incident
When this option is active the above email address will be notified that an unauthorized user has attempted to use the RelayFax system.
<Default> password
Accounts without their own password must use the system default
<Default> password
This is the system default password for sending faxes. Any account which does not have its own unique password must use this one if this feature is enabled.
DID Routing (requires DID-capable hardware)
Route inbound faxes to users based on DID
Only answer calls to user DID numbers
OK
Cancel
Help

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On the Options/Password pane of the Account Settings dialog, you can designate what RelayFax will do when it encounters a message that originates from an address other than those listed on the Accounts pane. These actions will also be taken when you are requiring your users to provide a password in their messages and an invalid one is given, or a password is omitted altogether.

These options are not applied unless the *Automatically add accounts when first fax from them is received* option (located on the Accounts 112 pane) has been turned off or the maximum number of Accounts has already been reached.

Non-Licensed Users

When a message is processed that does not originate from one of the addresses listed on the Accounts pane or does not contain a valid password, RelayFax will delete the incoming message and then take two possible actions listed below. You may configure RelayFax to do one, both, or neither of these tasks.

...send note telling him/her they are not authorized

When this checkbox is enabled, RelayFax will convert the contents of the NOACCESS.DAT file (located in the ...\RelayFax\app folder) into an email message and send it to the non-licensed user.

...inform [address] about incident

When this checkbox is enabled, RelayFax will send a message to the address specified, informing it that an unauthorized user has attempted to use the RelayFax system. Additionally, the complete message of the unauthorized user will be included with this email notification as a file attachment.

When neither of these options is enabled, RelayFax will simply delete unauthorized user messages and take no further actions.

<Default> password

When a password is required, messages that do not give the password to RelayFax will not be processed. This security measure is at your disposal if you are worried about non-authorized personnel sending faxes through your server. If such is the case, it is recommended that you specify a password and force users of your fax system to use it when they send a fax.

Accounts without their own password must use the system default

Enable this checkbox if you want all users to be required to include a password with their messages even when one hasn't been specifically assigned to their accounts. Accounts without their own unique password must use the password defined in the <Default> password control.

<Default> password

Specify the password that you wish to require of all users that haven't been given one specific to their account.

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DID Routing (requires DID-capable hardware)

Route inbound faxes to users based on DID
If you are using a Direct Inward Dialing (DID) system, then click this check box if you want RelayFax to automatically route incoming faxes to users based on the DID numbers assigned under their account settings.

Only answer calls to user DID numbers
Click this check box if you want RelayFax to respond only to incoming calls destined for DID numbers that have been specified under the individual user Accounts. Inbound calls to unknown DID numbers will not be answered by RelayFax.

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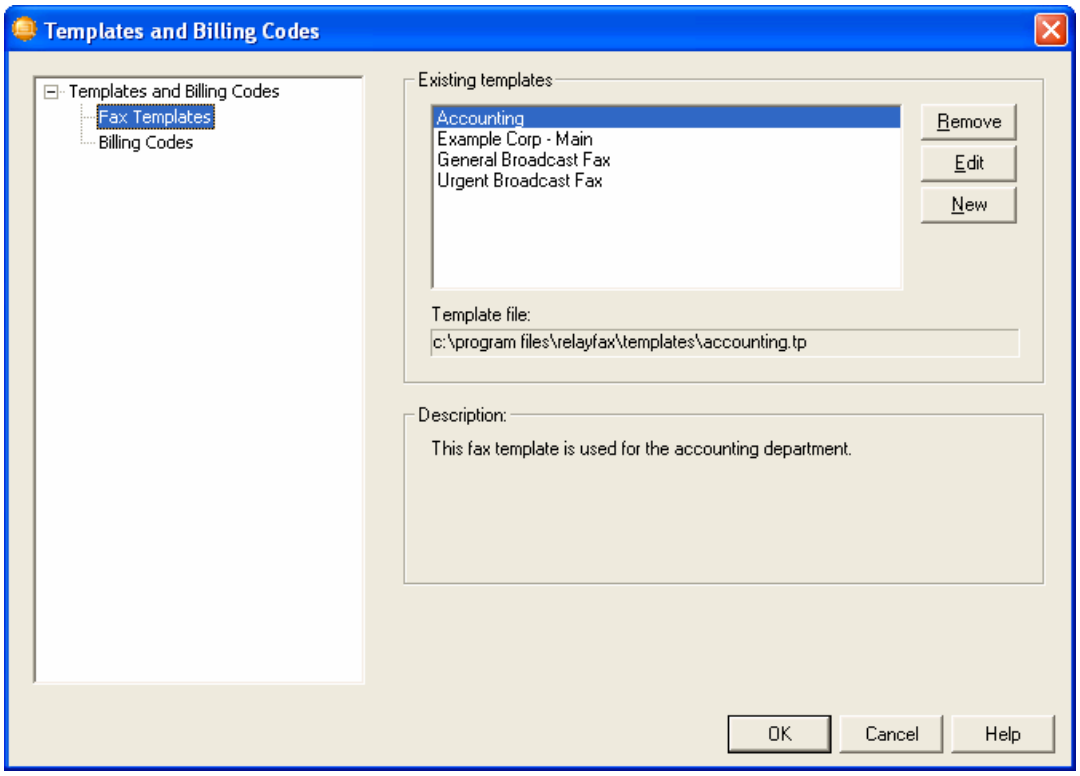
Section

12 Templates and Billing Codes

12.1 Fax Templates

12.1.1 Fax Templates



Fax Templates can be used to assign a large number of alternate variables to outbound faxes. Applied through the Outbound Fax Rules, templates make it possible to: use alternate cover pages and banner text, change the sender's name, company, Fax ID, fax and voice numbers, and assign alternate dialing and retry settings. With Templates you can cause RelayFax to simultaneously support and appear as any number of different fax devices at different companies or departments.

For more information on applying Templates through Outbound Fax Rules, see:

Outbound Fax Rules 86

Existing Templates
All available Templates are displayed in this area.

Remove
To remove a Template from the Existing Templates list, click the desired template and then the Remove button.

Edit
To edit a previously created Template, double-click the desired template in the

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Existing Templates list or click the template and then the Edit button. This will open the template's Template Properties 120 dialog.

New
Click the *New* button to open the New Template Properties 120 dialog used for creating new Templates.

Template File:
Here you will find the file path to the currently selected Template.

Description:
When you create a Template you will have the opportunity to include some comments or a description of the template for your personal reference. Those comments or descriptions will appear in this area when a template is selected from the Existing Templates list. This text will not appear on any faxed or printed pages.

See Also:

Template Description 120
Template Defaults 121
Template Options 123
Outbound Fax Rules 86

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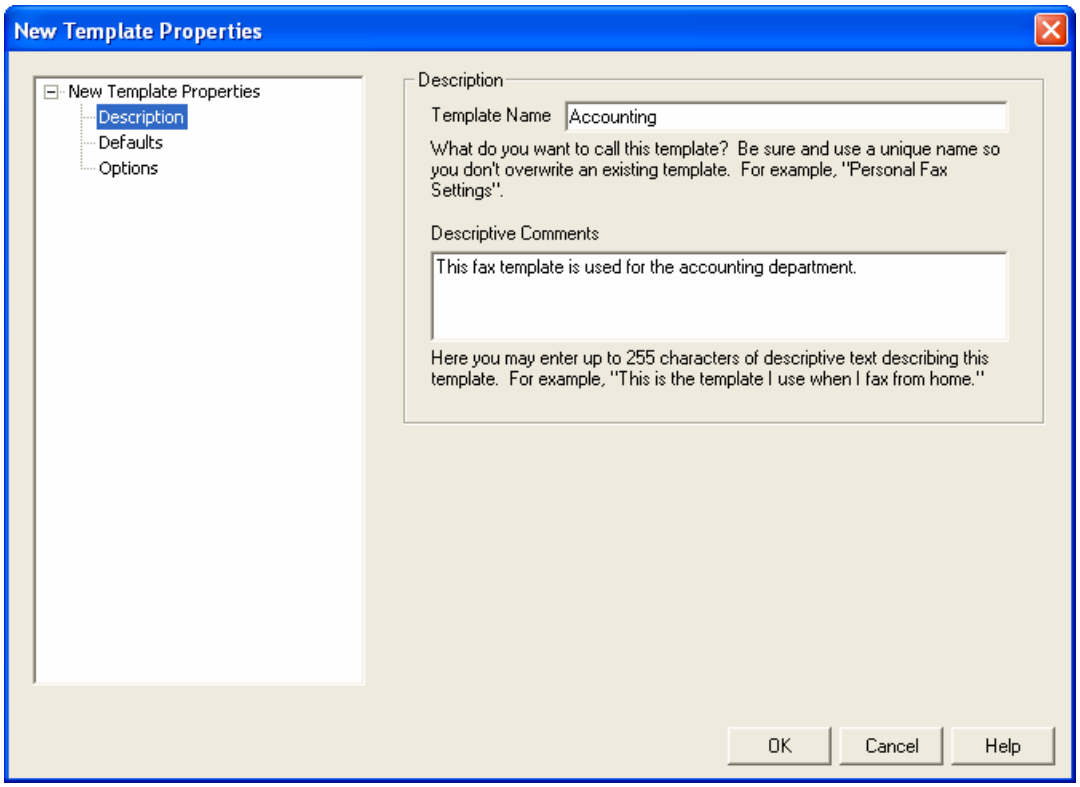
12.1.2 Template Properties

12.1.2.1 Description


New Template Properties
New Template Properties
Description
Defaults
Options
Description
Template Name
Accounting
What do you want to call this template? Be sure and use a unique name so you don't overwrite an existing template. For example, "Personal Fax Settings".
Descriptive Comments
This fax template is used for the accounting department.
Here you may enter up to 255 characters of descriptive text describing this template. For example, "This is the template I use when I fax from home."
OK
Cancel
Help

Description

Template Name
Type a name for your Template into this text box. This may be a descriptive name such as "The Frank Thomas Template".

Descriptive Comments
Here you may enter up to 255 characters of descriptive text or comments regarding this template. This can be used for reference to easily identify a specific template.

See Also:

Fax Templates 118
Template Defaults 121
Template Options 123
Outbound Fax Rules 86

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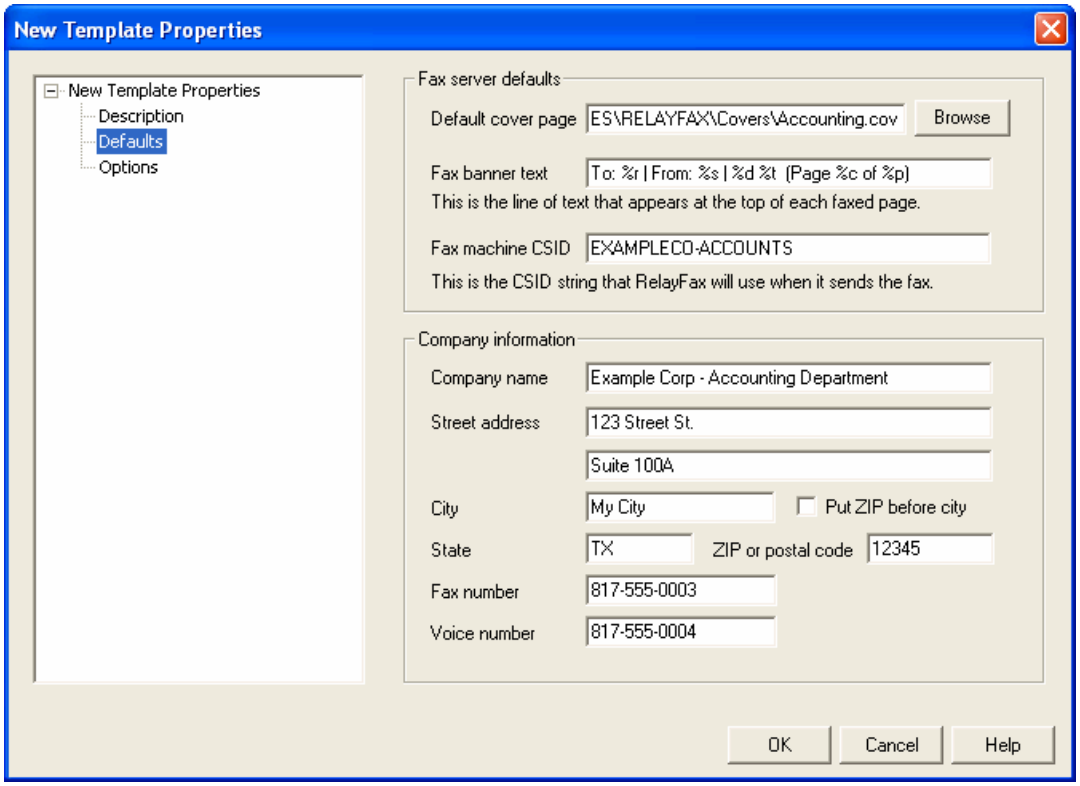
12.1.2.2 Defaults



Use the Defaults pane of the Template Properties dialog to assign alternate values to the options located on the Fax Server 41 pane of the RelayFax Properties 40 dialog. The items listed here will replace those values and appear on the cover page of faxes to which this Template applies.

Fax Server Defaults

Default cover page
This is the path to the cover page that will be included with all faxes that match an Outbound Fax Rule that applies this Template.

For a complete discussion on cover pages, see:

Cover Pages 106

Fax banner text
RelayFax will insert this line of text, called a banner, at the top of each faxed page to which this Template is applied. With RelayFax it is possible to custom format your Banner to automatically include various kinds of information such as the date and time, total pages, recipient or sender's name, Fax ID, and various other options.

For a detailed discussion regarding the banner text, and for a complete list and definition of available formatting characters, see:

Banner Text & Formatting Characters 42

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Fax machine CSID
Each fax device must have a unique fax ID. It is common practice to use either your company name or fax number as your fax ID. When two fax devices are negotiating a connection they make this information available to one another.

In some regions, providing a fax ID is required.

Company Information
In this section enter the name, address, fax number, and other information corresponding to the company from which you wish the fax to appear to originate. It is common practice to make much of this information available when sending and receiving faxes.

See Also:

Fax Templates 118
Template Description 120
Template Options 123
Outbound Fax Rules 86

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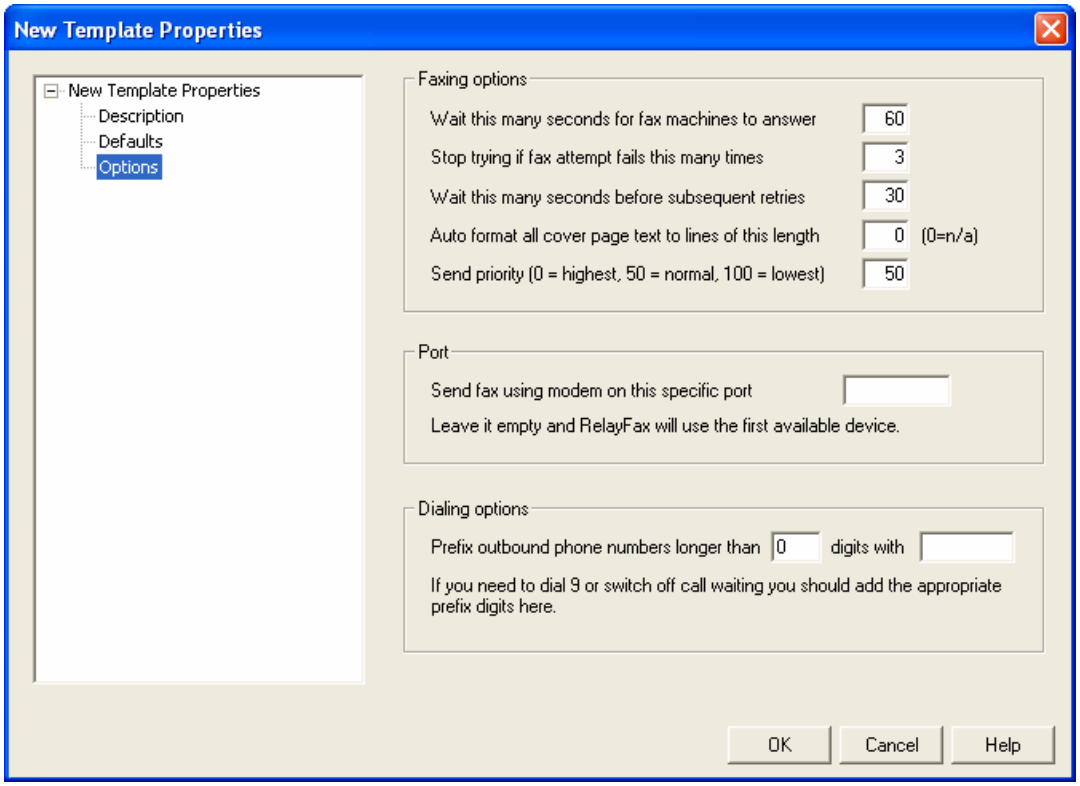
12.1.2.3 Options


New Template Properties
New Template Properties
Description
Defaults
Options
Faxing options
Wait this many seconds for fax machines to answer
60
Stop trying if fax attempt fails this many times
3
Wait this many seconds before subsequent retries
30
Auto format all cover page text to lines of this length
0
(0=n/a)
Send priority (0 = highest, 50 = normal, 100 = lowest)
50
Port
Send fax using modem on this specific port
Leave it empty and RelayFax will use the first available device.
Dialing options
Prefix outbound phone numbers longer than
0
digits with
If you need to dial 9 or switch off call waiting you should add the appropriate prefix digits here.
OK
Cancel
Help

With the Options pane of the Template Properties dialog, you can assign alternate values to the controls located in the Faxing and Dialing options sections of RelayFax Properties » Options 48. These alternate values will be applied to messages that match an Outbound Fax Rule 86 assigning this Template.

Faxing Options

Wait this many seconds for fax machines to answer
If the Fax number to which RelayFax is trying to connect doesn't answer within this many seconds, RelayFax will abort the attempt and try again later based upon the parameters outlined below.

Stop trying if fax attempt fails this many times
When a fax attempt fails, RelayFax will continue trying to send the fax until it has failed this many times. After this number of unsuccessful attempts RelayFax will give up permanently and inform the sender that the fax could not be sent. The default setting is "3". If you enter "0" or "1" in this option then RelayFax will not try to send the fax again if the initial attempt fails.

During retries of partially completed faxes, by default RelayFax will only attempt to resend unsent pages. If you wish to configure RelayFax to attempt to resend the entire fax instead, open `RelayFax.ini` in Notepad and change `ResendPartialFaxes=Yes` to `ResendPartialFaxes=No` under

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```
[FaxServer].
```

Wait this many seconds before subsequent retries
This is the amount of time that RelayFax will wait between subsequent delivery attempts.

Auto format all cover page text to lines of this length
Placing a value in this control will cause text placed in the cover page's comments section to have line breaks inserted at the specified length. Setting this control to "0" will cause the text to appear exactly as it was typed by the user. If the text was composed without any line breaks, and it extended beyond the edge of the designated comments area, then it would be truncated.

Send Priority
Use this option to designate a send priority for all faxes to which this template is applied. You can set the value from 0-100. "0" is the highest priority, "50" is the normal, default value, and "100" is the lowest. Faxes are always sent in the order of their priority setting.

Port

Send fax using modem on this specific port
Here you can restrict faxes to which this template is applied, to using the modem located on a specific port.

Dialing Options

Prefix outbound phone numbers longer than [xx] digits with [xx]
For outgoing faxes, you can have RelayFax automatically add a prefix to the called party's number. Prefixes may, for instance, be necessary to access a central office line, or to restrict the transmission of your Caller ID to the called party. RelayFax will, however, add the prefix to the number only if the number contains more digits than the amount specified here. If your fax device is connected to a PBX, the digit threshold can prevent the prefix from being dialed if the called number is an extension on the same PBX. Enter both the digit threshold and the prefix to be dialed into this option. Use "0" in the first box if you wish to add the prefix to all numbers dialed.

When specifying fax numbers for RelayFax to dial you can use "w" or "W" to cause RelayFax to wait for a subsequent dial tone. For example, "8w5551212" will dial 8, wait for the next dial tone, and then dial the remainder of the number. Similarly, the "%" character will insert a pause within the dialing process. For example, "8%5551212" will dial 8, pause, and then dial the rest of the number. The length of time during a pause is determined by modem S register settings.

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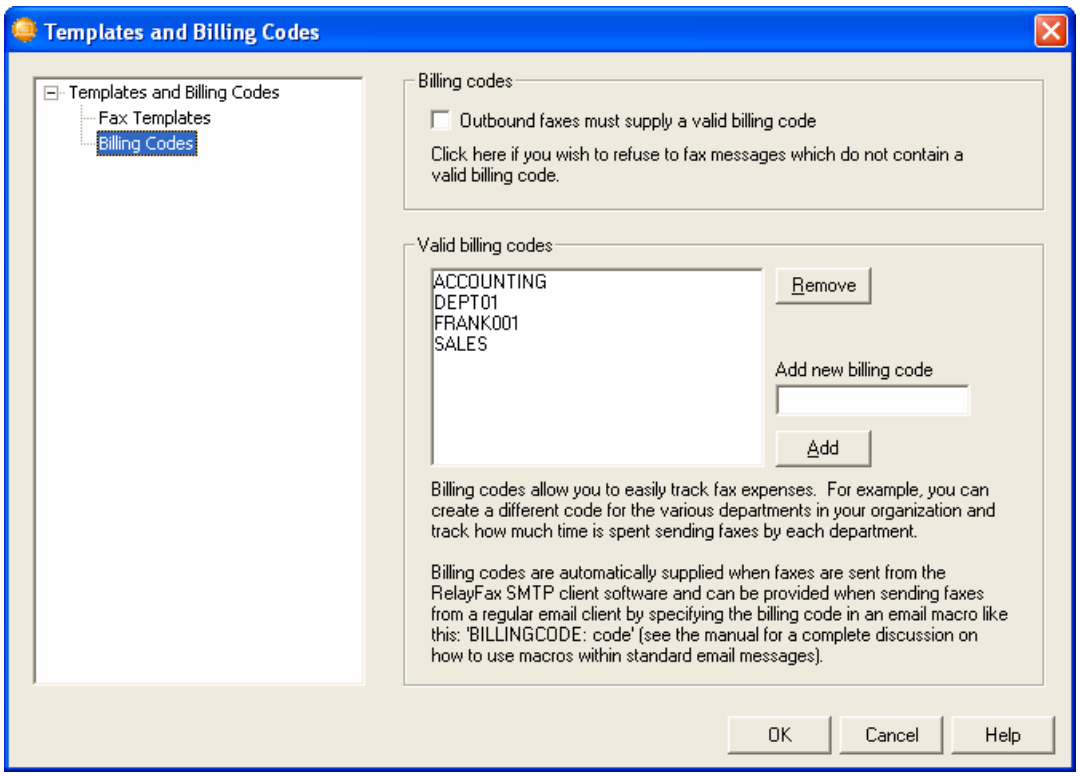
See Also:

Fax Templates 118
Template Description 120
Template Defaults 121
RelayFax Properties » Options 48
Outbound Fax Rules 86

12.2 Billing Codes


Templates and Billing Codes
Templates and Billing Codes
Fax Templates
Billing Codes
Billing codes
Outbound faxes must supply a valid billing code
Click here if you wish to refuse to fax messages which do not contain a valid billing code.
Valid billing codes
ACCOUNTING
DEPT01
FRANK001
SALES
Remove
Add new billing code
Add
Billing codes allow you to easily track fax expenses. For example, you can create a different code for the various departments in your organization and track how much time is spent sending faxes by each department.
Billing codes are automatically supplied when faxes are sent from the RelayFax SMTP client software and can be provided when sending faxes from a regular email client by specifying the billing code in an email macro like this: 'BILLINGCODE: code' (see the manual for a complete discussion on how to use macros within standard email messages).
OK
Cancel
Help

Combined with the Outbound Fax Rules 86 and Exporting 65 features, billing codes can be used to track the fax expenses and RelayFax time usage of specific groups of users. Users can be forced to include a billing code before their fax will be accepted, and rules can be configured that will cause specific actions to be taken when certain billing codes are encountered. The export file includes a field for each fax's billing code and can therefore be used as a field in a spreadsheet, which you might wish to create in order to track this usage.

Billing Codes

Outbound faxes must supply a valid billing code
Click this option if you want to require all users to supply a billing code in their fax messages before they will be accepted. Billing codes can be inserted via the the outbound fax rules, the RelayFax SMTP Client, or by using the Billing Code email

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macro when sending a fax via an email client.

Valid Billing Codes
This box displays all valid billing codes that you have created.

Remove
To remove a code from the list, click the code and then click this button.

Add new billing code
To add a billing code to list, enter it here and then click the Add button.

See also:

Outbound Fax Rules 86
Exporting 65
Email Macros 192

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Section XII

13 RelayFax SMTP Client

13.1 Introduction

RelayFax includes a special application called the RelayFax SMTP Client, which can be installed on your network workstation, at home, or at any other remote location. The RelayFax SMTP Client, and the accompanying RelayFax Printer Driver 156 and RelayFax OCR (Optical Character Recognition) Printer Driver, make it possible to fax anything that you can scan or print. The client will attach the relevant document to an email message and then send it to the RelayFax server. Then, based upon the contents of the message or the fax rules configured on the server, RelayFax will route the fax to its appropriate destination. The client also contains a "Cover page only" feature for sending short messages requiring only a cover page. Documents can be faxed by printing to the RelayFax Printer Driver instead of to your normal printer, scanning them using the client's scanner and twain support, or by attaching files using the client's Attached Documents pane.

Whenever you scan a document or print one to the RelayFax Printer Driver, the RelayFax SMTP Client will be opened automatically for completing your fax. You will enter the fax recipient information manually or with the Contact Manager, choose from several other options such as alternate cover pages and scheduling, and then click the Send Fax button. The client will then email the document to your RelayFax server's mailbox (dialing into the Internet if necessary) where it will be collected and faxed to its final destination.

When faxing documents via the RelayFax OCR Printer Driver, the documents will be scanned for specific identifiers to determine the recipient's fax number and name, the subject of the fax, and so on. It will then be sent to your RelayFax server normally, just like when sending manually or printing to the RelayFax Printer Driver. The Fax Client, however, will not be opened because the recipient and other information will be taken from the document itself.

The RelayFax SMTP Client and RelayFax Printer Driver can also be accessed by custom applications in order to automatically fax documents. For more information on using this functionality, see: Sending Faxes Programmatically 166

RelayFax SMTP Client Features

- Immediate faxing from within any application by printing a document to the RelayFax Printer Driver 156.
- A cover page comment 142 feature allows quick and easy faxing of a brief "cover page only" message.
- Full twain device support 150 for faxing from scanners and digital cameras.
- Quick-Scan 139 features make it possible to scan and fax documents by simply clicking a shortcut menu option or pressing the button on your scanner.
- Contact Manager 140 that can be used to share contacts over a network.
- Confirmation Request 154 feature that will cause RelayFax to inform the sender when their fax has been successfully transmitted.
- RAS Dialup 135 controls make it possible for the Client to automatically dial into

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the Internet when being used remotely.

- Support for including extra information 142 on the cover page such as: recipient's name and company, sender's name and contact information, billing codes, and more.
- Client may be used to email 142 messages directly to users instead of to RelayFax for faxing.
- Scheduling 149 feature so that you can designate a specific date and time to send the fax.
- By setting the parameters in the FAXCLNT.INI file, the RelayFax SMTP Client and RelayFax Printer Driver can be accessed programmatically 166 by other applications, which enables them to send faxes automatically.
- Client contains a personal cover page manager 145 and can utilize custom cover pages.
- Client allows attachment 153 of documents to outgoing faxes.

See also:

Using the RelayFax SMTP Client 129

13.2 Using the RelayFax SMTP Client

Starting the Client

To start the RelayFax SMTP Client click the icon on the desktop, or click the Windows START button and navigate to the client's icon in the RelayFax program group. The client starts automatically when you print to the RelayFax Printer Driver from within a Windows application, or when you click the scan button on your scanner.

Using the Client

When the client is running, an icon will be displayed in the system tray. Right-click this icon to display a shortcut menu from which you can access various client features.

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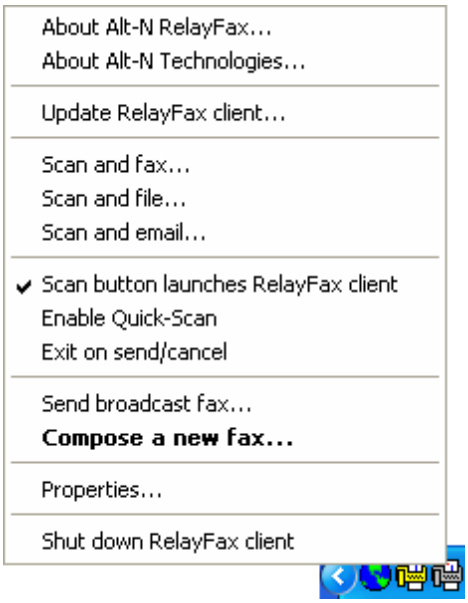

The following items are available on the shortcut menu:

About Alt-N RelayFax – Click this option to display copyright, developer, and support information about RelayFax.

About Alt-N Technologies – Opens your browser to Alt-N Technologies' web site.

Update RelayFax Client – Click this option to find out if there is a more recent version of the RelayFax SMTP Client available. This will cause a Client Update Request to be sent to your RelayFax server. Be sure that you have entered your information into the Server Settings 134 and Dialup Settings 135 panes of the Properties dialog before attempting to send an update request. Without this information the client won't be able to send your request correctly. NOTE: Some RelayFax servers might not be configured to accept requests for client update information. Consequently, some users may not receive a response to their update requests.

Scan and fax – If your computer has a scanner installed then you can click this option to have the RelayFax SMTP Client scan a document and then open the Compose Fax dialog to fax it.

Scan and file – Click this option to scan and save a document to your hard disk. You will be prompted to choose the folder where you wish the file to be saved.

Scan and email – Click this option to scan a document and then email it to someone. First, type the recipient's email address into the dialog that will open (or click the Contacts button on it and then choose the recipient). Next, click OK and type a subject for the email on the Compose Fax dialog. Click Send Fax when you are ready to send the email.

Scan button launches RelayFax client – Some scanners have a button that can be used for "one-touch" scanning. Enable this shortcut option if you want your scanner button to automatically launch the RelayFax Client in addition to activating your scanner.

Enable Quick-Scan – When this option is enabled and you attempt to use your

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scanner to acquire a document, the RelayFax Client will immediately scan the document using the scanner's current default settings rather than present you with a Scanner Options dialog first. A check mark will appear beside this option when it is enabled.

Exit on send/cancel – Activate this option if you want the RelayFax SMTP Client to shut down after a fax is sent or the Cancel button inside the client is clicked – the client will close and the tray icon will disappear. When this control is not enabled, the Compose Fax dialog will close but the tray icon will still be accessible.

Send broadcast fax - Opens the broadcast fax wizard 167 that will walk you through the steps of sending a broadcast fax.

Compose a new fax – Click this option to open the client's Compose Fax 141 dialog.

Shut down RelayFax client – Click this option to shut down the RelayFax SMTP Client. The tray icon will disappear and all client dialogs will close.

Properties – Click this option to open the client's Properties 132 dialog, which is used to configure your personal settings, server settings, dialup options, and more.

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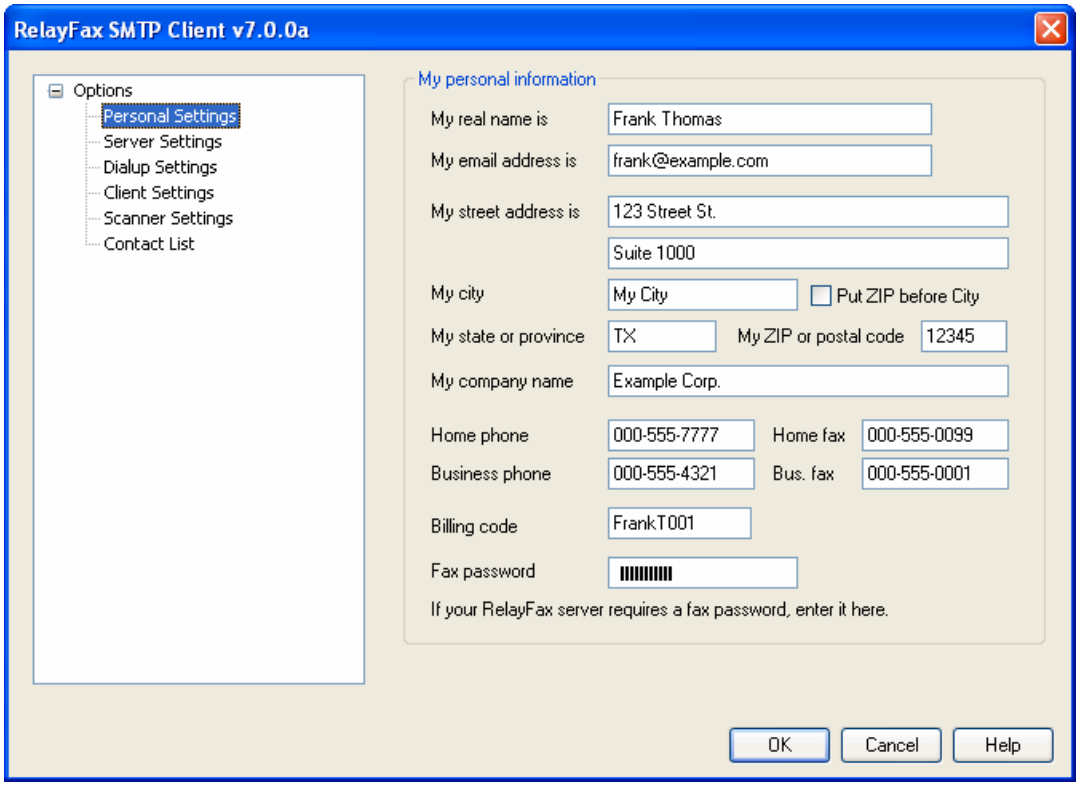
13.3 Properties Dialog

13.3.1 Personal Settings



The Personal Settings pane is used to include various bits of personal information on your fax's cover page. This information may also be compared by the RelayFax server to its Outbound Fax Rules. When a message matches one of the rules, the server will perform whatever action the rule was designed to cause. It could, for example, fax the message to a specific destination, print it, email it to someone, and so on.

Filling in the fields on this dialog doesn't necessarily mean they will all appear on the cover page. Cover pages will only display the information that they have been designed to display.

My Personal Information

My real name is
Enter your name here. This information may appear on the cover page of faxes that you send.

My email address is
Place your email address in this text box. RelayFax will send delivery confirmation notices and notifications of problems with your fax to this address.

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This address must match a licensed user of the RelayFax system. For information on RelayFax User Accounts, see: Accounts 112.

My street address is
Enter your street address here. Two fields are provided but you can leave the second one blank if it isn't needed.

My city
This field is for you city.

My state or province
Enter your state or province here.

My ZIP or postal code
This field is for your ZIP or postal code.

Put ZIP before City
When formatting an address in some regions, the zip or postal code is placed before the city. Click this check box if you want your address to be formatted that way.

My company name
Type the name of your company here.

Home phone
Your home telephone number.

Home fax
Your home fax number.

Business phone
Enter the voice telephone number of your business.

Business fax
This is your business fax number.

Billing code
If you are required to provide a billing code or special identifier with your faxes, enter it into this field.

Fax password
If you are required to include a password with your faxes then enter it here.

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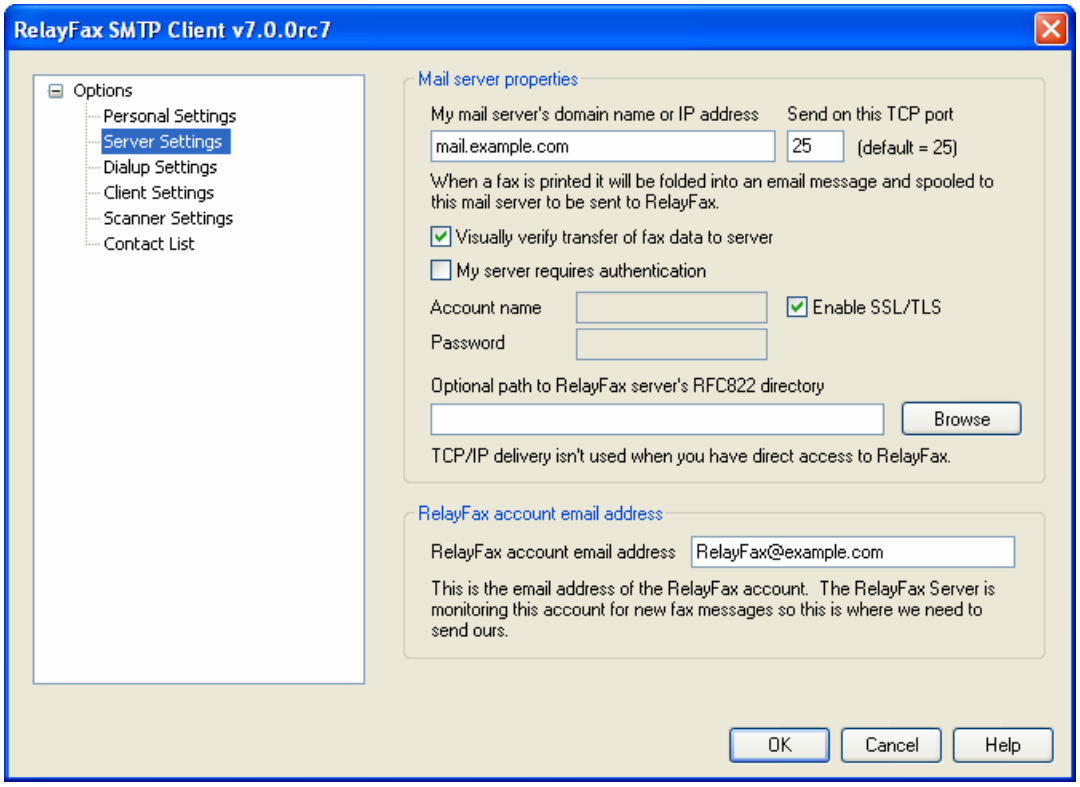
13.3.2 Server Settings


RelayFax SMTP Client v7.0.0rc7
Options
Personal Settings
Server Settings
Dialup Settings
Client Settings
Scanner Settings
Contact List
Mail server properties
My mail server's domain name or IP address
Send on this TCP port
mail.example.com
25
(default = 25)
When a fax is printed it will be folded into an email message and spooled to this mail server to be sent to RelayFax.
Visually verify transfer of fax data to server
My server requires authentication
Account name
Enable SSL/TLS
Password
Optional path to RelayFax server's RFC822 directory
Browse
TCP/IP delivery isn't used when you have direct access to RelayFax.
RelayFax account email address
RelayFax account email address
RelayFax@example.com
This is the email address of the RelayFax account. The RelayFax Server is monitoring this account for new fax messages so this is where we need to send ours.
OK
Cancel
Help

This dialog is used to configure various settings that the RelayFax SMTP Client needs in order to process your faxes.

Mail Server Properties

My mail server's domain name or IP address
Enter the domain name or IP address of your mail server, where your email account is located. This could be a mail host provided by your Internet service provider, a mail service provider, or a server located at your company. When sending a fax the RelayFax SMTP Client will fold it into an email message and then send that message to this mail server for delivery to the RelayFax Server mailbox.

Send on this TCP port
The client will send your messages on this port.

Visually verify transfer of fax data to server
Normally the client transfers fax data in the background. Click this switch to interactively monitor transactions as they occur.

My server requires authentication
Click this check box and enter your login credentials below if you are required to log in to your mail server when sending email.

Account name
Enter the account name or login used for logging into your mail server.

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Password
Enter the password corresponding to the *Account name* specified above.

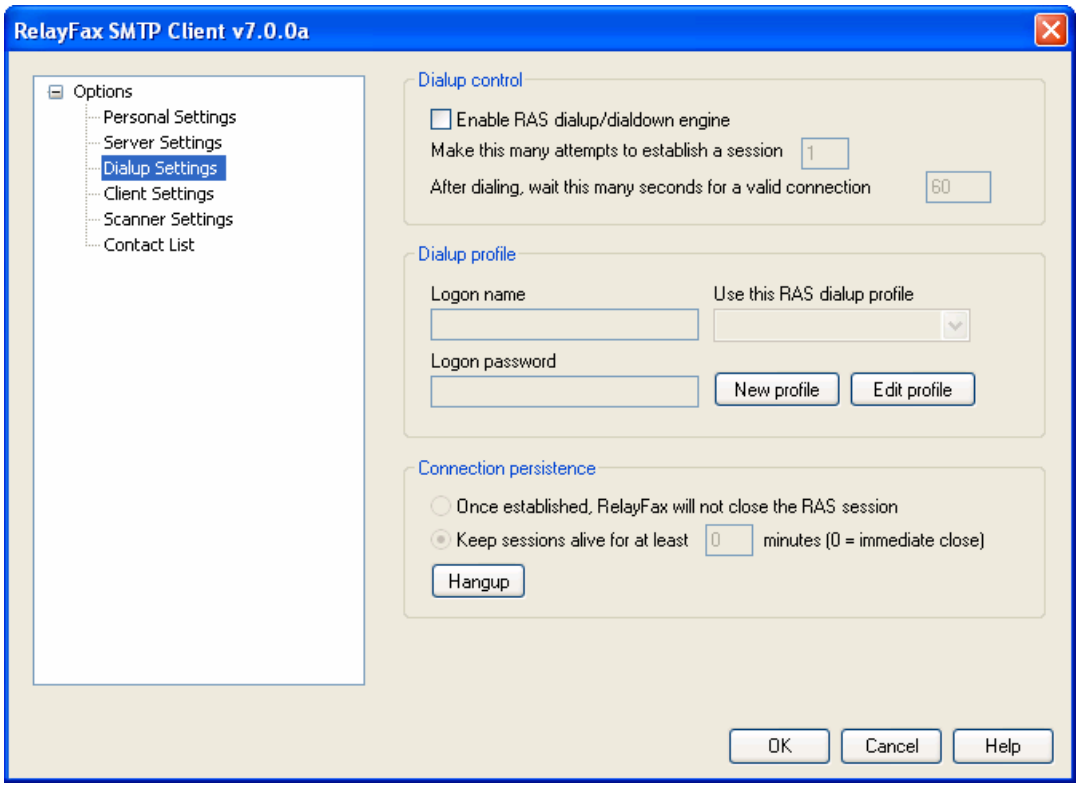
Enable SSL/TLS
Check this box if you wish to use SSL/TLS when sending faxes to the mail server.

Optional path to RelayFax server's RFC822 directory
If your RelayFax SMTP Client is installed on the same machine as your RelayFax server, or one that is accessible via your local area network, then you can specify the path to its RFC822 directory here (e.g. "C:\Program Files\RelayFax\Rfc822"). This will deliver your outbound faxes directly to RelayFax instead of having to go through your mail server.

RelayFax Account Email Address

RelayFax account email address
This is the email address that the RelayFax server will check for messages waiting to be faxed. All of your outbound fax messages should be sent here so that they can be processed by RelayFax.

13.3.3 Dialup Settings



Use the options on this pane if you need to configure your client to dial in to the Internet in order to pass a fax to the RelayFax server for faxing. If your computer resides on a network or you have some other direct connection to the Internet such as

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DSL, then this feature will not be necessary.

Dialup Control

Enable RAS dialup/dialdown engine
Click this checkbox to enable/disable the dialup feature.

Make this many attempts to establish a session
RelayFax will attempt to connect to the remote host this many times before giving up.

After dialing, wait this many seconds for a valid connection
This value determines how long the client will wait for the remote computer to answer and complete the dialup connection.

Dialup Profile

Logon name
The value specified here will be passed to the remote host during the authentication process.

Logon password
The value specified here will be passed to the remote host during the authentication process.

Use this RAS dialup profile
This drop-down list allows you to select the session profile that has been previously defined through windows Dialup Networking or Remote Access Services Setup.

New profile
Click this button to create a new Dialup Networking or Remote Access Services profile.

Edit profile
Click this button to edit the currently selected Dialup Networking or Remote Access Services profile.

Connection Persistence

Once established, RelayFax will not close the RAS session
By default, RelayFax will shut down a created connection immediately after all mail transactions have been completed and the session is no longer in use. Selecting this option will allow the session to remain active even after all mail has been sent.

Keep sessions alive for at least XX minutes
If enabled, this option will allow a RelayFax created RAS session to survive for at least the number of minutes specified. Placing a zero in this entry will cause the connection to be immediately closed after all transactions have been completed.

Hangup
This button will break the connection to the ISP. This button is active only if RelayFax has initiated the dialup session.

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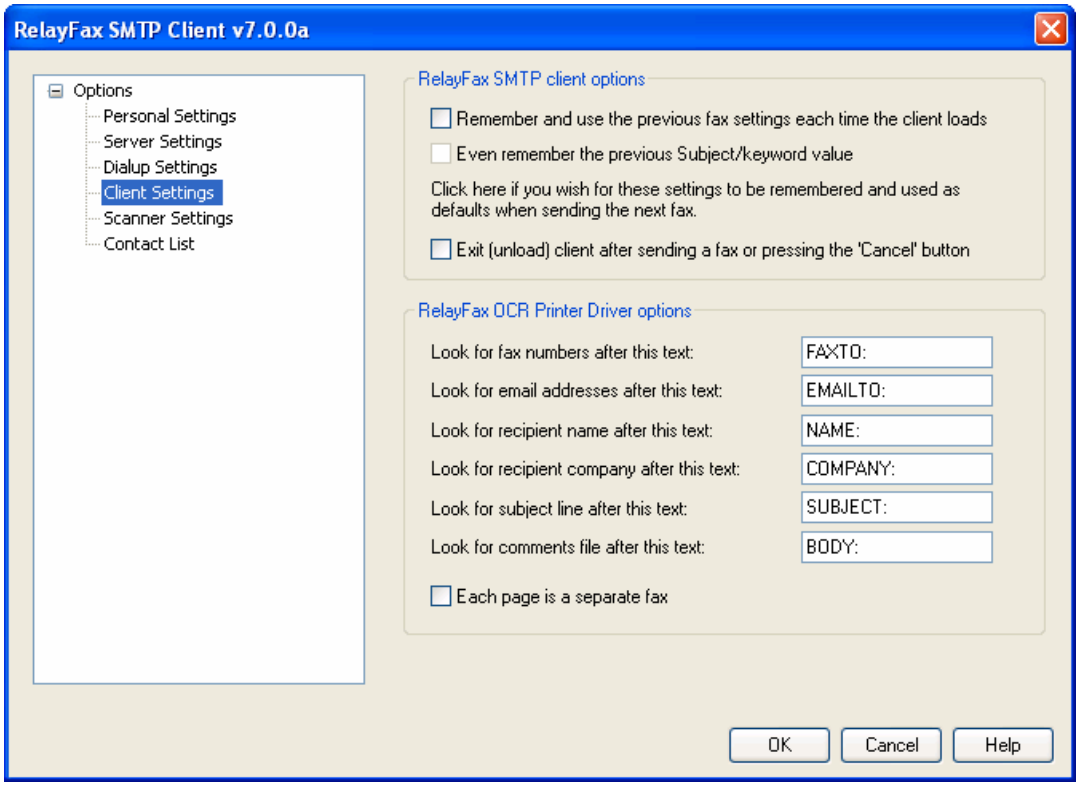
13.3.4 Client Settings


RelayFax SMTP Client v7.0.0a
Options
Personal Settings
Server Settings
Dialup Settings
Client Settings
Scanner Settings
Contact List
RelayFax SMTP client options
Remember and use the previous fax settings each time the client loads
Even remember the previous Subject/keyword value
Click here if you wish for these settings to be remembered and used as defaults when sending the next fax.
Exit (unload) client after sending a fax or pressing the 'Cancel' button
RelayFax OCR Printer Driver options
Look for fax numbers after this text:
FAXTO:
Look for email addresses after this text:
EMAILTO:
Look for recipient name after this text:
NAME:
Look for recipient company after this text:
COMPANY:
Look for subject line after this text:
SUBJECT:
Look for comments file after this text:
BODY:
Each page is a separate fax
OK
Cancel
Help

RelayFax SMTP Client options

Remember and use the previous fax settings each time the client loads
Click this checkbox if you want RelayFax to save the client's current settings for the next time the client is opened. This will also save any recipient information that you have filled in on the Compose Fax dialog's Properties 142 pane. However, the Recipient list will not be saved.

Even remember the previous Subject/keyword value
If you have enabled the "*Remember and use the previous fax settings...*" checkbox then click this control if you want the content of the "Subject/Keyword" field on the Properties 142 pane of the Compose Fax dialog to be saved as well.

Exit (unload) client after sending a fax or pressing the 'Cancel' button
Check this box if you want the Client to exit and the tray icon to disappear after sending a fax or clicking the 'Cancel' button on the dialog. If this control is not enabled then the tray icon will remain active but the dialog will still close.

RelayFax OCR Printer Driver Options

When sending a fax by printing a document to the RelayFax OCR Printer Driver, the

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settings in this section will be used during the Optical Character Recognition scan to determine the various parameters associated with the fax. Place these identifiers in your documents in order to designate the fax number, the recipient's name, the subject of the fax, and so on.

Look for fax numbers after this text
When the RelayFax OCR Printer Driver encounters this text while scanning a document, the set of numbers immediately following this identifier will be treated as a fax number.

Look for email addresses after this text
When the RelayFax OCR Printer Driver scans a document, it will look for an email address immediately following this designated text. RelayFax will then email a copy of the fax to the address.

Look for recipient name after this text
This text denotes that there is a recipient name following.

Look for recipient company after this text
The fax client will treat text following this identifier as the recipient's company name.

Look for subject line after this text
This text identifies the subject line of the fax.

Look for comments file after this text
After this text, the fax client will look for a reference to a text file; the contents of the file will be included in the comment section of the cover page. The text file must be contained in the \RelayFax\App\ subfolder.

Each page is a separate fax
Click this check box if you wish to treat each page of a document printed to the OCR Printer Driver as a separate fax. If using this option, be sure to include an identifier listed above such as FAXTO: or EMAILTO: on each page of the document.

You can also use this feature to include multiple, consecutive pages of a document in a single fax. Any pages that do not include either a FAXTO: or EMAILTO: identifier will be appended to the fax delimited by the last page that did include one of those identifiers. For example, if page one and page six of a document included a FAXTO: identifier, then pages one through five would be included with the first fax, and pages six and subsequent pages would be included with the second fax.

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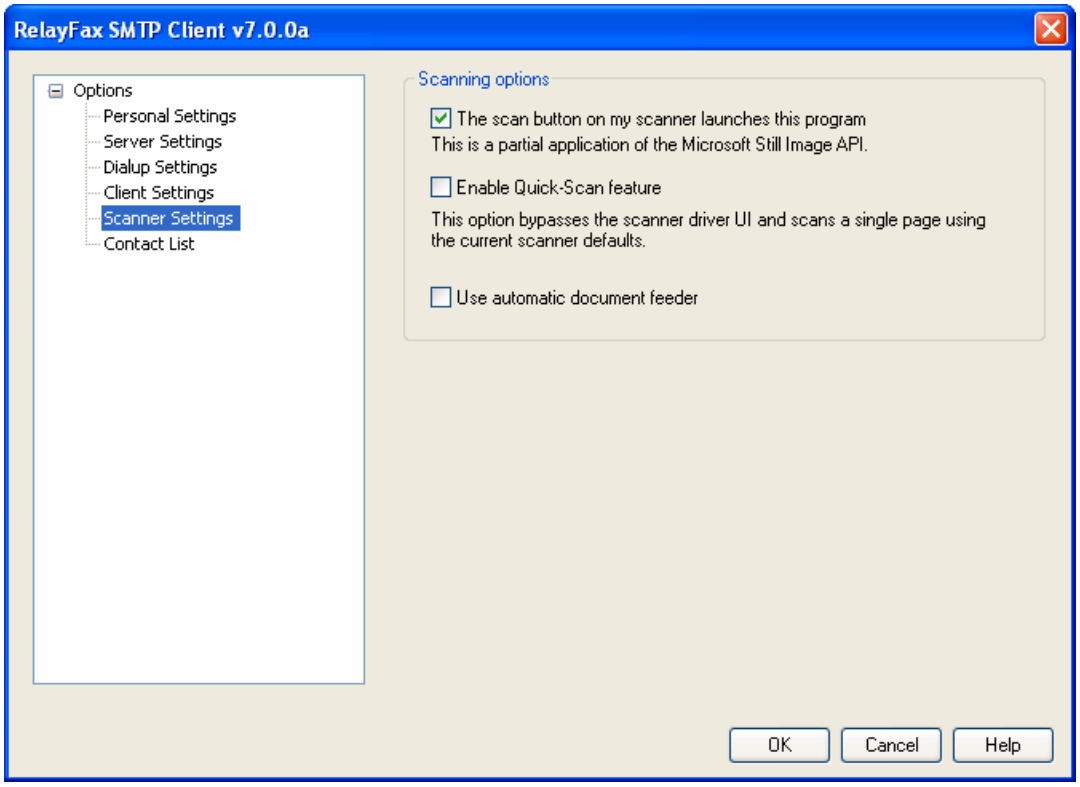
13.3.5 Scanner Settings



Scanning Options

The Scan button on my scanner launches this program
Click here if you want the RelayFax Client to respond when you press the scan button on your scanner.

Enable Quick-Scan feature
Click this control if you want the Scanning Options 151 dialog and your scanner's user interface to be bypassed whenever you scan a document. Scanning will begin immediately using the scanner's current default settings. Clear this control if you want Scanning Options and your user interface to open before scanning.

Use automatic document feeder
If your scanner is equipped with an automatic document feeder, then click this check box if you wish to use it with RelayFax.

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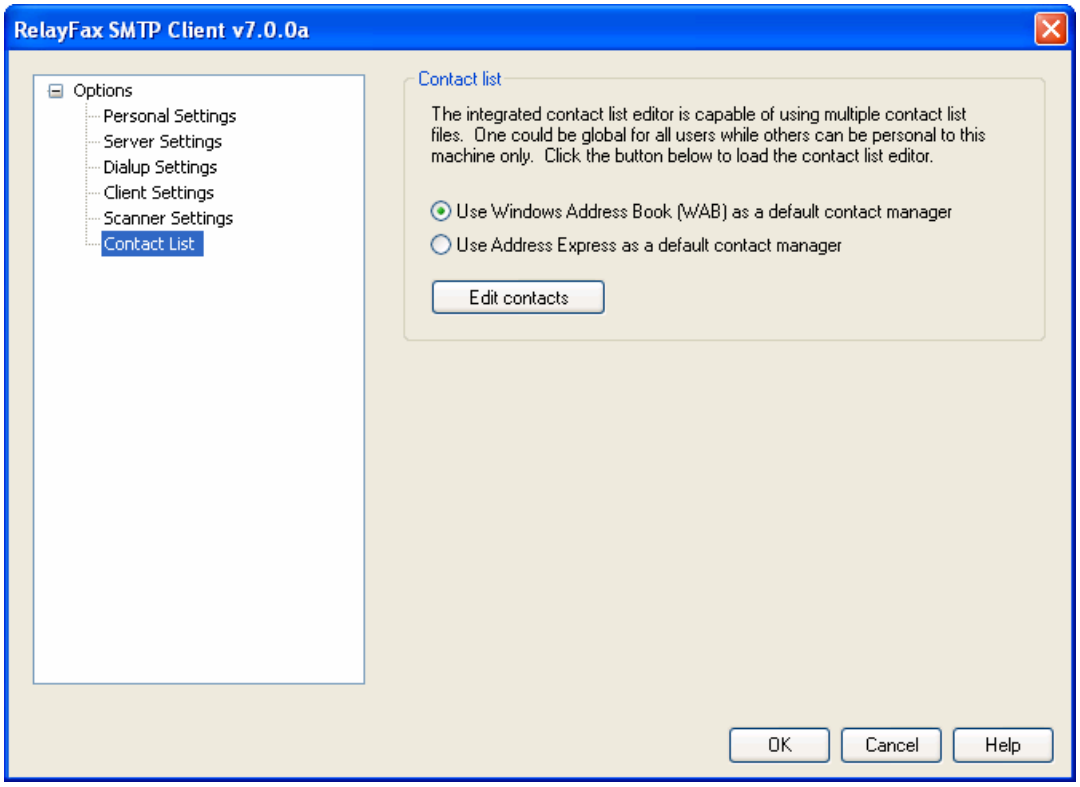
13.3.6 Contact List


RelayFax SMTP Client v7.0.0a
Options
Personal Settings
Server Settings
Dialup Settings
Client Settings
Scanner Settings
Contact List
Contact list
The integrated contact list editor is capable of using multiple contact list files. One could be global for all users while others can be personal to this machine only. Click the button below to load the contact list editor.
Use Windows Address Book (WAB) as a default contact manager
Use Address Express as a default contact manager
Edit contacts
OK
Cancel
Help

The RelayFax SMTP Client is equipped with integrated support for two contact management systems. You can choose to use either Windows Address Book (WAB) or the included Address Express (Address Ex) as your default contact manager. WAB is enabled by default, but if you wish to use Address Ex then you can change the default setting on this pane.

Address Express can be used to manage all of your contacts, and supports storing a large amount of information for each one. You can add up to 50 fields for each contact, assign contacts to groups, add notes for them, sort by any field, launch your web browser, phone dialer, or email program, and a host of other features.

For more information regarding the various features and options available within either WAB or Address Ex, see their respective online Help systems.

See also:

Compose Fax Dialog » Properties 142

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13.4 Compose Fax Dialog

13.4.1 Compose Fax Dialog

The Compose Fax dialog is used to enter information relevant to individual faxes. This dialog appears when you click "Compose a new fax..." or one of the scanning options on the RelayFax Client's shortcut menu 129. It will appear automatically each time that you print to the RelayFax Printer Driver.

This dialog contains six panes:

Properties 142
On this pane you will specify the fax number, the subject of the fax, the recipient's name and company, and any comments that you want to appear on the cover page.

Cover Pages 145
This pane allows you to specify what cover page (if any) will be included with an outbound fax.

Send Schedule 149
Used for scheduling a specific date and time that the fax should be sent.

Scan Image 150
Used to acquire a document from a scanner or twain device for faxing. For other options see the Scanner Settings 139 pane on the client's Properties dialog.

Attached Documents 153
Use the settings on this pane to attach documents to your fax. If the RelayFax Server has Attachment Faxing support enabled, each attached document will be converted to a faxable image format and sent as additional pages. Attachments will also be listed here when you use the RelayFax Printer Driver.

Advanced Options 154
Used for designating a priority setting for your fax. This pane also contains a control that governs whether or not a confirmation will be returned to you when your fax is delivered.

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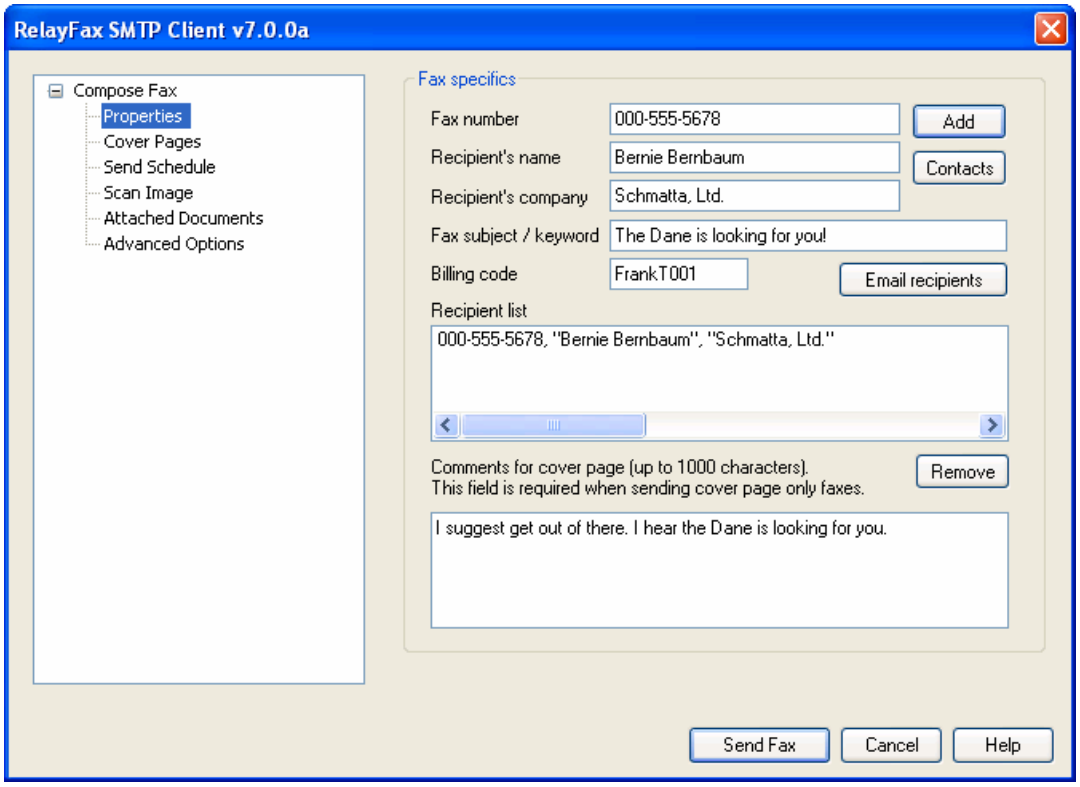
13.4.2 Properties



On this pane you will specify the number to which you want the fax to be sent, the subject of the fax, the recipient's name and company, and any comments that you want to appear on the fax's cover page.

Fax Specifics

Fax number
Enter the fax number to which you want your fax to be sent and then click the Add button to add it to the recipient list. This will also add the contents of the other recipient information fields.

Recipient's Name
Place the name of the fax recipient here.

Recipient's Company
Place the name of the fax recipient's company here.

Fax subject/keyword
Enter the subject of the fax into this field. This field can also be used for entering keywords that the RelayFax server's fax rules system may be configured to search for.

Billing code
This control will display the default billing code value that you have designated on the Personal Settings pane of the Client Properties dialog. You may enter an

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alternate value into this text field if you wish to override it for the current fax.

Add
Click this button to add the contents of Fax number, Recipient name,and Recipient company to the recipient list.

Contacts
Entries can also be added to the Recipient list by using the Contact Manager 140 or the MDaemon/Outlook Contacts dialog. Click Contacts and then choose either the RelayFax Contacts or MDaemon/Outlook Contacts option to open the desired dialog. If using the Contact Manager, click any entry that you wish to add to the list, and then click OK. If using the MDaemon/Outlook Contacts dialog, click the desired entry and then click either the Send Email or Send Fax icon. In both dialogs you can select multiple entries by holding down the CTRL key as you click them.

When using the MDaemon/Outlook option you can access either your WorldClient contacts stored online in your MDaemon/WorldClient email account (requires MDaemon 9.0 or later), or you can access your Outlook contacts stored locally under an Outlook profile, when Outlook is your default email client.

Email Recipients
If you wish to email a copy of the fax to someone, click this button to specify the address.

Recipient List
This is the list of all the recipients that will receive a copy of this fax. This list must contain at least one recipient.

Remove
Click this button to remove selected entries from the Recipient List.

Comments for cover page
Use this box to enter any text that you wish to appear in the comments section of the cover page. If there is more text than will fit in the space provided, a separate page will be created for the comments. Comments are limited to 3000 characters. Any text beyond 3000 characters is ignored.

Send Fax
After you have filled in all areas relevant to your fax, click this button to send it. The RelayFax SMTP Client will fold the fax into an email message and dispatch it to the RelayFax Server. The Recipient List must contain at least one entry for this button to be enabled.

To send a "cover page only" fax, simply use this pane to enter the recipients and your comments and then click *Send Fax*. As long as you have not included any Attached Documents 153, the cover page with your included comments is all that will be sent.

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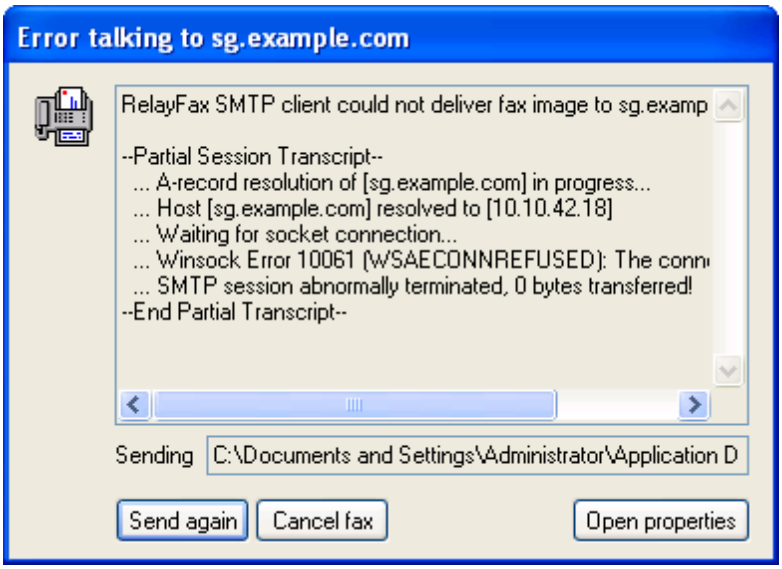
Error Message

After clicking *Send Fax* on the Compose Fax dialog, a warning message may appear informing you that the client encountered an error while attempting to deliver the fax. This is usually due to an error in your Client Properties configuration — a partial transcript of the delivery attempt will be displayed to help you diagnose the problem. Click *Open Properties* to open the Client Properties dialog so that you can check your settings. The mail server and dialup settings information on this dialog must be entered properly in order for the client to be able to deliver messages. Make sure that the correct IP address or domain name of your mail server has been entered on the Server Settings 134 pane and that correct ISP account information has been entered on the Dialup Settings 135 pane (if using the dialup features). You can also click *Send again* if you wish to try to send the fax again or *Cancel fax* to cancel it.


Error talking to sg.example.com
RelayFax SMTP client could not deliver fax image to sg.examp
--Partial Session Transcript--
... A-record resolution of [sg.example.com] in progress...
... Host [sg.example.com] resolved to [10.10.42.18]
... Waiting for socket connection...
... Winsock Error 10061 (WSAECONNREFUSED): The conn
... SMTP session abnormally terminated, 0 bytes transferred!
--End Partial Transcript--
Sending
C:\Documents and Settings\Administrator\Application D
Send again
Cancel fax
Open properties

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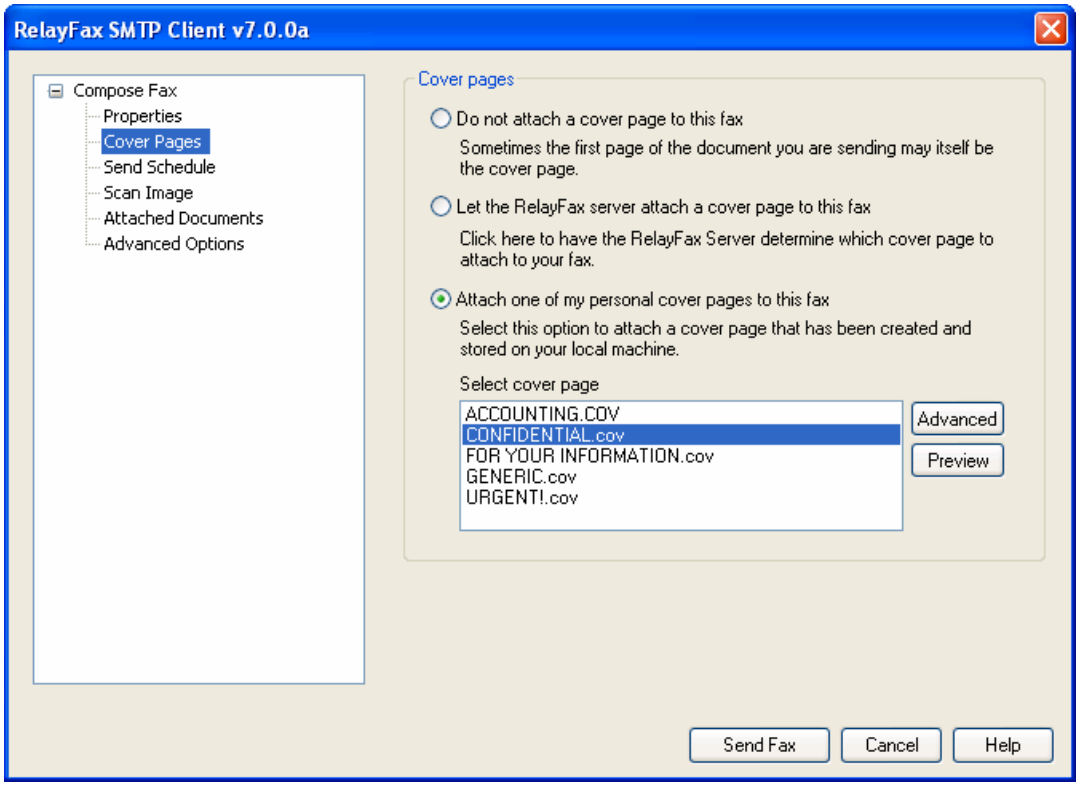
13.4.3 Cover Pages


RelayFax SMTP Client v7.0.0a
Compose Fax
Properties
Cover Pages
Send Schedule
Scan Image
Attached Documents
Advanced Options
Cover pages
Do not attach a cover page to this fax
Sometimes the first page of the document you are sending may itself be the cover page.
Let the RelayFax server attach a cover page to this fax
Click here to have the RelayFax Server determine which cover page to attach to your fax.
Attach one of my personal cover pages to this fax
Select this option to attach a cover page that has been created and stored on your local machine.
Select cover page
ACCOUNTING.COV
CONFIDENTIAL.cov
FOR YOUR INFORMATION.cov
GENERIC.cov
URGENT!.cov
Advanced
Preview
Send Fax
Cancel
Help

This pane allows you to specify what cover page (if any) will be included with an outbound fax.

Do not attach a cover page to this fax
Click this checkbox if you do not want RelayFax to append a cover page. In such cases only the printed document will be faxed. The information that the RelayFax Server automatically includes on regular cover pages will not be included. However, each page will still contain a banner at the top.

When this option is selected, the Comments area located on the Properties 142 pane will be unavailable, since there will be no cover page on which to list any comments.

If you want to create a custom cover page and include it with your document (instead of the RelayFax formatted cover pages) you can use this feature to do so. Simply create your cover page (using whatever method you wish) and then make it the first page of your document. Then, after printing the document to the RelayFax Printer Driver make sure that the "*Do not attach a cover page to this fax*" checkbox is enabled before sending the fax.

Let the RelayFax server attach a cover page to this fax
Click here to have the RelayFax Server attach a default cover page to this fax.

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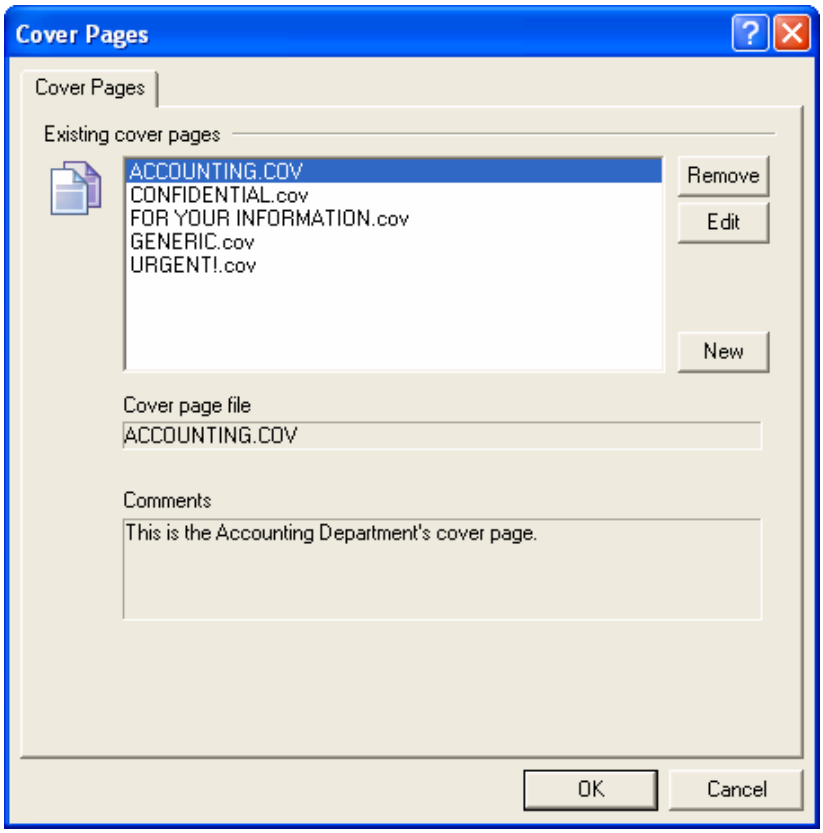
Attach one of my personal cover pages to this fax
Click here and select a cover page from the list and it will be used when the fax is sent.

Preview
Click this button to preview the cover page, as it will appear in the fax.

Advanced
Click this button to open the Cover Pages dialog. This can be used to manage your custom cover pages.



The RelayFax SMTP Client integrates with the Microsoft Cover Page Editor included with Windows. This application provides a very high level of custom cover page design and creation capability. The Microsoft Cover Page Editor allows you to create and edit richly formatted cover pages which are supported directly by RelayFax.

The RelayFax SMTP Client uses the Microsoft Cover Page Editor included with Microsoft Windows XP, 2000, 2003, Vista, and 2008, excluding XP Home and Vista Home. If the cover page editor is not installed or associated with these files then you may need to go to Add/Remove Programs in the control panel and install the Fax Services (also known as "Windows Fax and Scan") under Add/Remove Windows

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Components.

Although the RelayFax SMTP Client can be installed and used on the Home editions of Windows XP and Vista, the cover page editor options will not work because those versions of the operating system do not include the fax services.

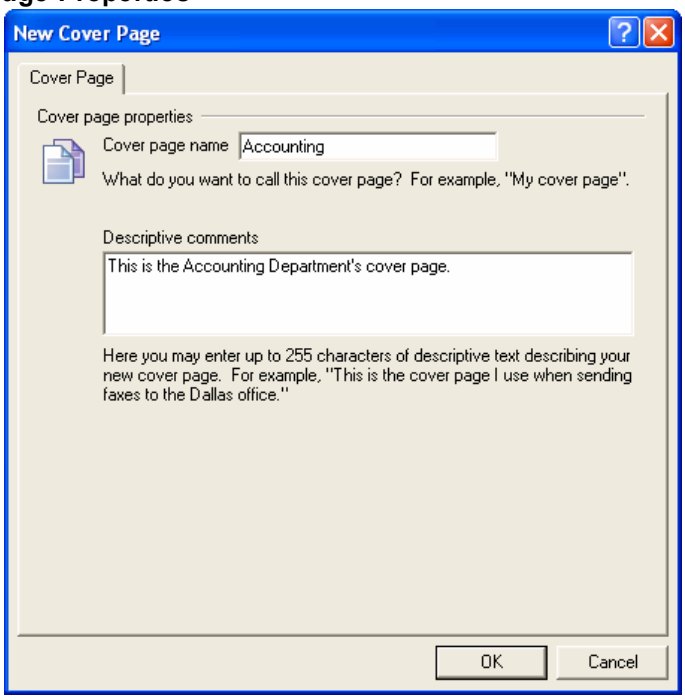
Existing Cover Pages
This box displays all available cover pages that you have created.

Remove
You may delete a cover page by selecting it from the Existing Cover Pages list and then clicking the Remove button. You will be asked to confirm your decision to delete the cover page before proceeding.

Edit
To edit a previously created cover page select it from the Existing Cover Pages list and then click the Edit button. The cover page will be loaded into the Microsoft Cover Page Editor (not available in XP Home or Vista Home editions). For more information on using the Cover Page Editor, click "Help»Help Topics" within the editor.

New
To create a new cover page, click the *New*. This will open the Cover Page Properties dialog, on which you will assign a name for your cover page, and include any desired comments or notes about this page for your reference.

Cover Page Properties


New Cover Page
Cover Page
Cover page properties
Cover page name
Accounting
What do you want to call this cover page? For example, "My cover page".
Descriptive comments
This is the Accounting Department's cover page.
Here you may enter up to 255 characters of descriptive text describing your new cover page. For example, "This is the cover page I use when sending faxes to the Dallas office."
OK
Cancel

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Cover page name
Type a name for your cover page into this text box. This may be a descriptive name such as "The Frank Thomas cover page".

Descriptive Comments
Here you may enter up to 255 characters of descriptive text or comments regarding this cover page. This can be used for reference to easily identify a specific cover page. This is helpful when creating Outbound Fax Rules to assign alternate cover pages. For example, "This is the cover page that Frank Thomas uses when sending faxes about his many heroic exploits." When this particular cover page is selected from the Existing Cover Pages list this text will appear in the Comments section of the Cover Pages dialog.

These comments are saved in your cover page folder as the file "<Cover Page Name>.cmt".

Cover page file:
This is the filename of the cover page. Cover pages are stored in the . . . `\RelayFax\Covers` subfolder.

Comments:
When you create a cover page you will have the opportunity to include some comments or a description of the page for your personal reference. These comments will appear in this area when a cover page is selected from the Existing Cover Pages list. This text will not appear on the cover page itself.

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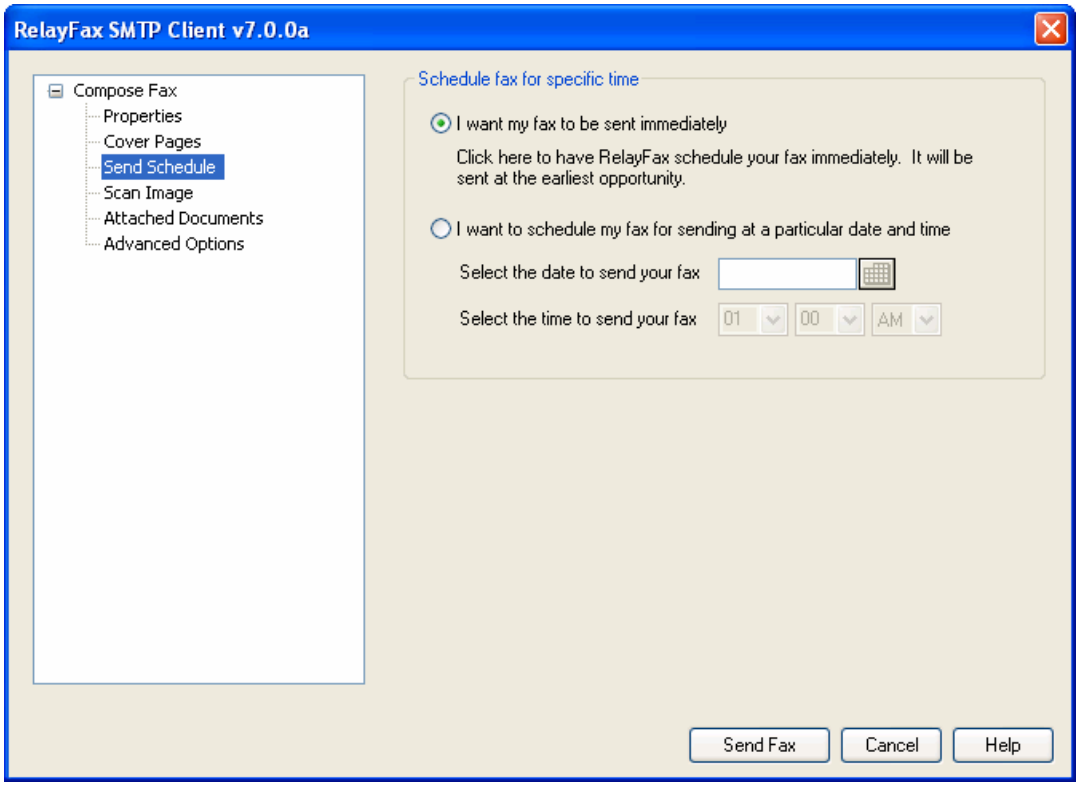
13.4.4 Send Schedule


RelayFax SMTP Client v7.0.0a
Compose Fax
Properties
Cover Pages
Send Schedule
Scan Image
Attached Documents
Advanced Options
Schedule fax for specific time
I want my fax to be sent immediately
Click here to have RelayFax schedule your fax immediately. It will be sent at the earliest opportunity.
I want to schedule my fax for sending at a particular date and time
Select the date to send your fax
Select the time to send your fax
01
00
AM
Send Fax
Cancel
Help

This pane makes it possible for you to designate a specific date and time for RelayFax to send your fax.

Schedule fax for specific time

I want my fax to be sent immediately
Click this option if you want the RelayFax server to send your fax at the earliest opportunity and on the first available fax modem.

I want to schedule my fax for sending at a particular date and time
Choose this option to cause the RelayFax server to send your fax at a specific date and time.

Select the date to send your fax
Type the date that you want your fax to be sent. The date must be in the format: mm/dd/yyyy. You can also click to open a calendar from which you can choose the date instead.

Select the time to send your fax
Use the drop-down list boxes to choose the hour, AM or PM, and minute to send the fax.

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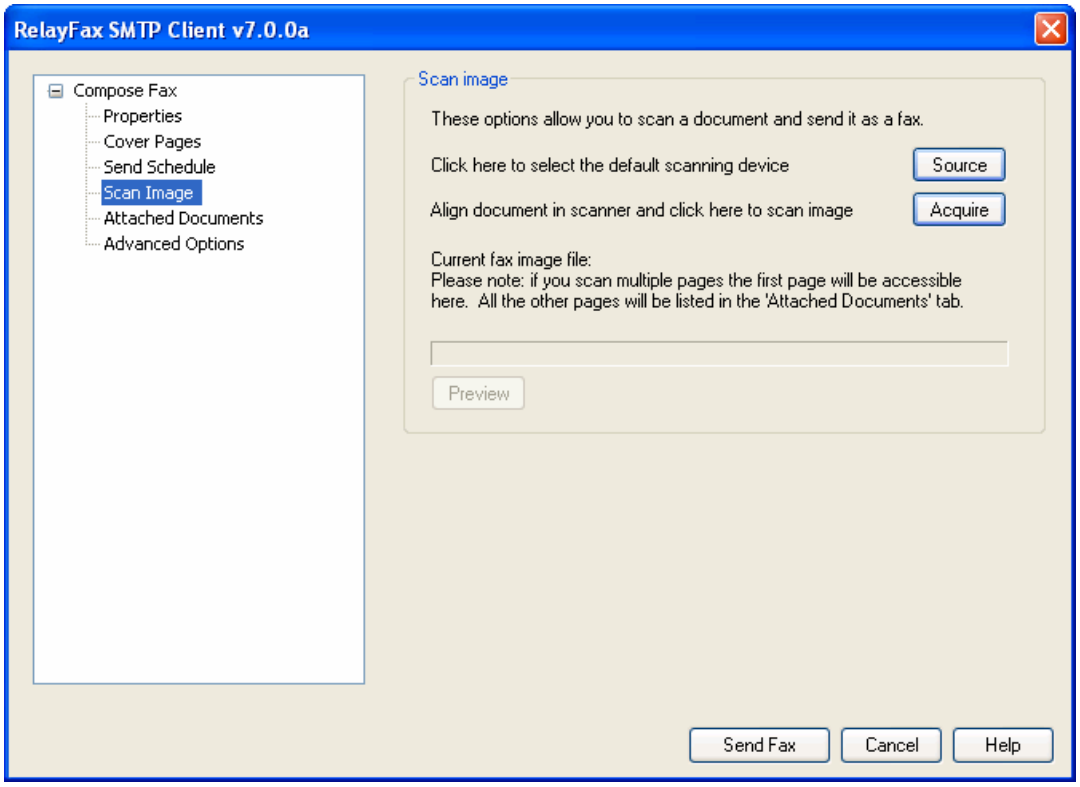
13.4.5 Scan Image


RelayFax SMTP Client v7.0.0a
Compose Fax
Properties
Cover Pages
Send Schedule
Scan Image
Attached Documents
Advanced Options
Scan image
These options allow you to scan a document and send it as a fax.
Click here to select the default scanning device
Source
Align document in scanner and click here to scan image
Acquire
Current fax image file:
Please note: if you scan multiple pages the first page will be accessible here. All the other pages will be listed in the 'Attached Documents' tab.
Preview
Send Fax
Cancel
Help

The RelayFax SMTP Client supports TWAIN compatible devices such as scanners and digital cameras. Direct scanner support makes it possible for you to use the client in the same manner that you would use a typical fax machine. You can scan a document at the touch of a button, type-in a fax number, and then click "Send Fax" to send it.

Scan Image

Source
Click the "Source" button to open the Select Source dialog, which lists all available TWAIN devices that it finds on your machine. Next, select the device that you want the client to use and then click the "Select" button. The selected device will then become the default source from which documents will be acquired.

Acquire
Click this button to acquire a document from the selected source. Before acquiring the document, the Scanning Options 151 dialog will be opened unless you are using the Quick-Scan feature located on the Scanner Settings 139 pane.

Current fax image file
When you acquire a document from a TWAIN device the path to the file will be displayed in this field.

Only a single file can be displayed in this field. When scanning multiple pages the first one will be listed here and the

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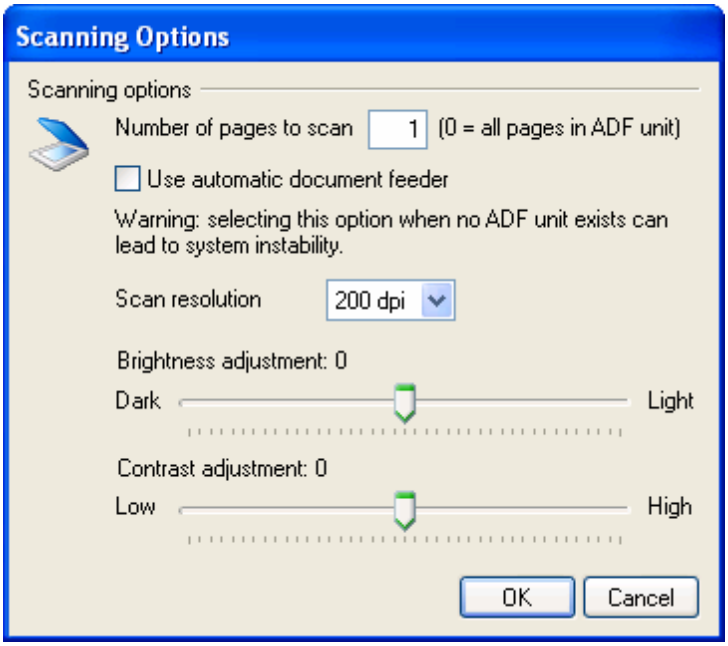
remainder will be listed on the Attached Documents 153 pane.

View
Click *View* to open the file listed in the Current fax image file control.

See also:

Scanning Options 151
Scanner Settings 139
Attached Documents 153

13.4.5.1 Scanning Options



Scanning Options

Number of pages to scan [xx]
If you are sending a multi-page fax, use this control to enter the number of pages that it contains (including cover page). You will be prompted to ready each page before it is scanned. Depending upon your scanner, a product-specific user interface may or may not appear. If you are using an automatic document feeder (ADF) with your scanner then you may enter "0" to cause it to scan all loaded pages. Be sure to enable the *Use automatic document feeder* control if you are using one.

Use automatic document feeder
Click this check box if your scanner is equipped with an ADF unit.

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Do not enable this control if your scanner isn't equipped with an automatic document feeder. Configuring the client to use an ADF unit when there isn't one could lead to errors or system instability.

Scan resolution
Click the drop-down list box and choose the resolution setting that you want to be used when scanning the documents.

Brightness adjustment
Use This slider to adjust the brightness setting that will be used when scanning.

Contrast adjustment
Use this slider to adjust the contrast setting that will be used when scanning.

Not all scanner device drivers will accept the Resolution, Brightness, and Contrast settings from RelayFax. You may have to replicate these settings once the scanner driver user interface has loaded.

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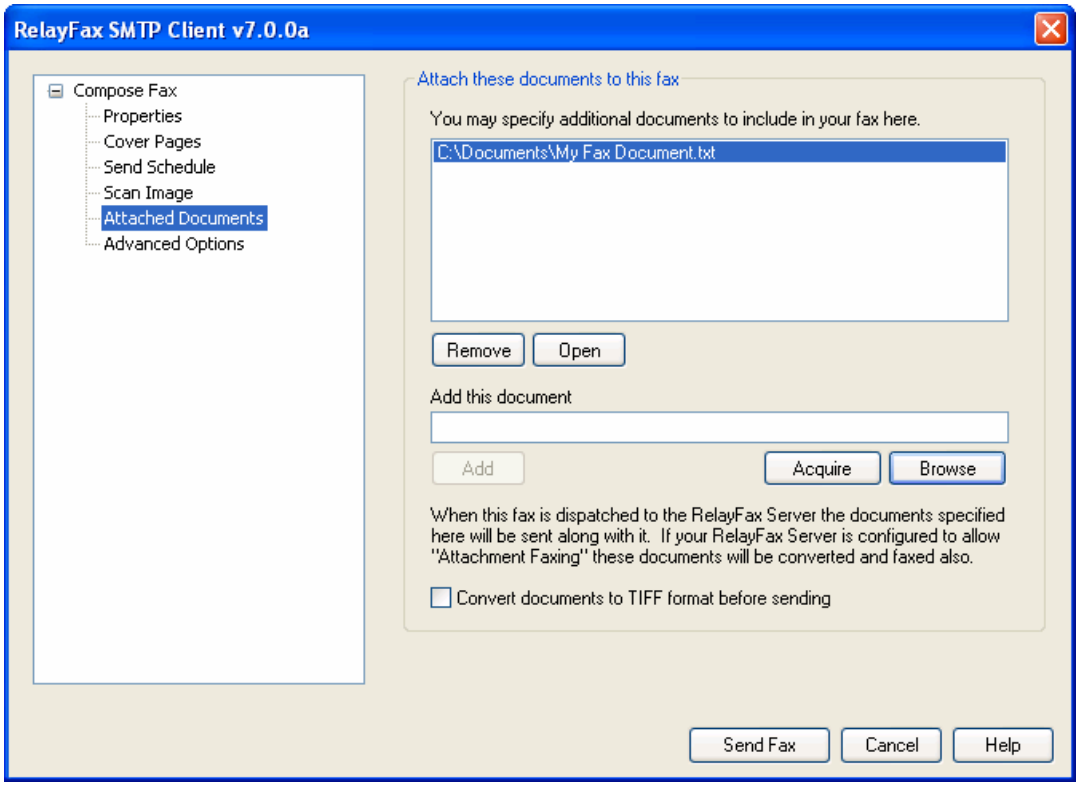
13.4.6 Attached Documents


RelayFax SMTP Client v7.0.0a
Compose Fax
Properties
Cover Pages
Send Schedule
Scan Image
Attached Documents
Advanced Options
Attach these documents to this fax
You may specify additional documents to include in your fax here.
C:\Documents\My Fax Document.txt
Remove
Open
Add this document
Add
Acquire
Browse
When this fax is dispatched to the RelayFax Server the documents specified here will be sent along with it. If your RelayFax Server is configured to allow "Attachment Faxing" these documents will be converted and faxed also.
Convert documents to TIFF format before sending
Send Fax
Cancel
Help

Use the settings on this pane to attach documents to your fax. If the RelayFax Server has Attachment Faxing support enabled, each attached document will be converted to a faxable image format and sent as additional pages.

Attach These Documents To This Fax
This list shows the currently attached documents.

Remove
Click this button to remove the selected documents from the list.

Open
Select a file from the list and then click this button to open it.

Add This Document
Type in the path to the document you wish to include with this fax.

Add
Click here to add the specified document to the list.

Acquire
Click this button to acquire a document from your default TWAIN device.

Browse
Click here to select a document to include with this fax.

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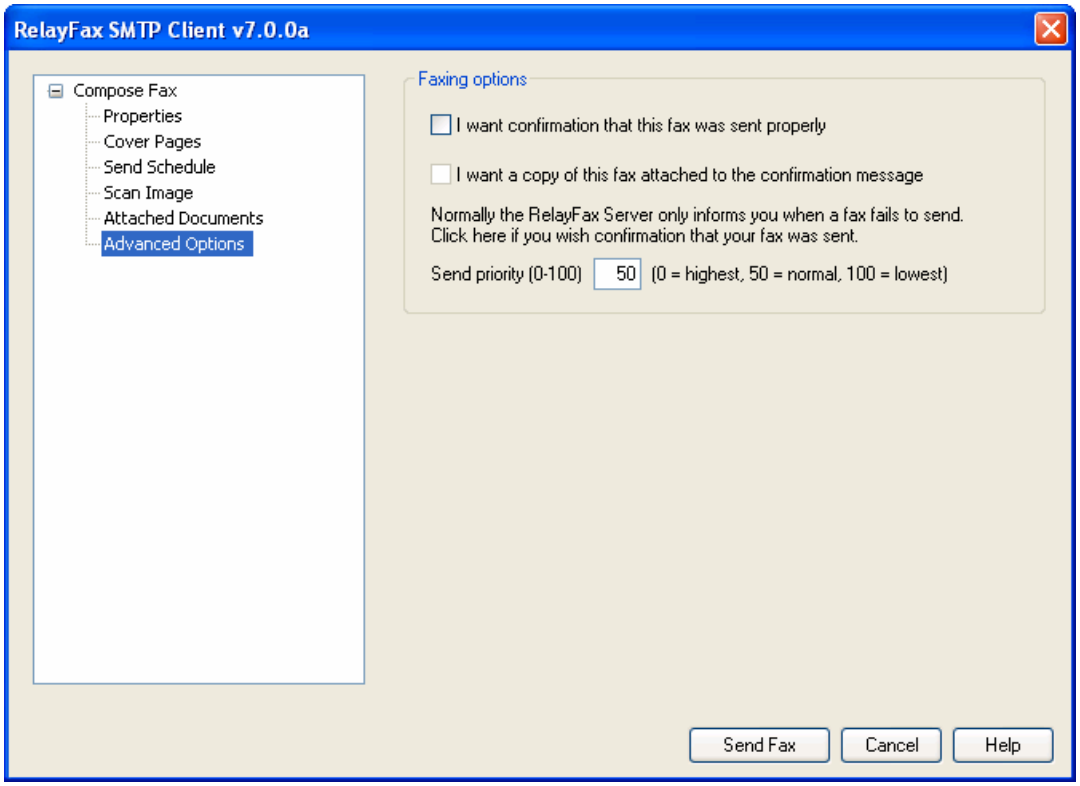
Convert documents to TIFF format before sending
Click this option if you want the client to convert the documents for you before sending rather than letting the fax server convert them.

13.4.7 Advanced Options


RelayFax SMTP Client v7.0.0a
Compose Fax
Properties
Cover Pages
Send Schedule
Scan Image
Attached Documents
Advanced Options
Faxing options
I want confirmation that this fax was sent properly
I want a copy of this fax attached to the confirmation message
Normally the RelayFax Server only informs you when a fax fails to send.
Click here if you wish confirmation that your fax was sent.
Send priority (0-100) 50 (0 = highest, 50 = normal, 100 = lowest)
Send Fax
Cancel
Help

This pane is used to specify the email address to which fax images will be mailed and other properties associated with sending the fax.

Faxing Options

I want confirmation that this fax was sent properly
Click this checkbox to request that RelayFax send you a confirmation notice when it has successfully transmitted your fax. Ordinarily RelayFax would only send a message to you if it could not send your fax.

This feature will only work if the RelayFax Server has been configured to honor these requests.

I want a copy of this fax attached to the confirmation message
Click this option if you want the confirmation message to have a copy of your sent fax attached to it. This control will not be available when the "I want confirmation that this fax was sent properly" control is cleared.

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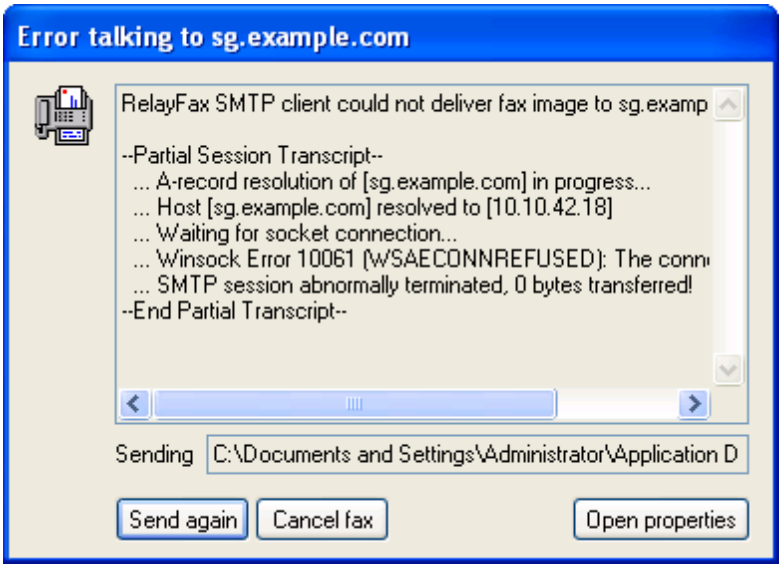
Send Priority
This control if for designating a priority value for your fax. The order in which RelayFax will send faxes is determined by each fax's priority value – 0 is the highest priority and 100 is the lowest. Higher priority faxes will always be sent first. If this control is left blank then RelayFax will assign the "normal" priority value of 50.

13.4.8 Error Message

After clicking *Send Fax* on the Compose Fax dialog, a warning message may appear informing you that the client encountered an error while attempting to deliver the fax. This is usually due to an error in your Client Properties configuration — a partial transcript of the delivery attempt will be displayed to help you diagnose the problem. Click *Open Properties* to open the Client Properties dialog so that you can check your settings. The mail server and dialup settings information on this dialog must be entered properly in order for the client to be able to deliver messages. Make sure that the correct IP address or domain name of your mail server has been entered on the Server Settings 134 pane and that correct ISP account information has been entered on the Dialup Settings 135 pane (if using the dialup features). You can also click *Send again* if you wish to try to send the fax again or *Cancel fax* to cancel it.


Error talking to sg.example.com
RelayFax SMTP client could not deliver fax image to sg.examp
--Partial Session Transcript--
... A-record resolution of [sg.example.com] in progress...
... Host [sg.example.com] resolved to [10.10.42.18]
... Waiting for socket connection...
... Winsock Error 10061 (WSAECONNREFUSED): The conn
... SMTP session abnormally terminated, 0 bytes transferred!
--End Partial Transcript--
Sending
C:\Documents and Settings\Administrator\Application D
Send again
Cancel fax
Open properties

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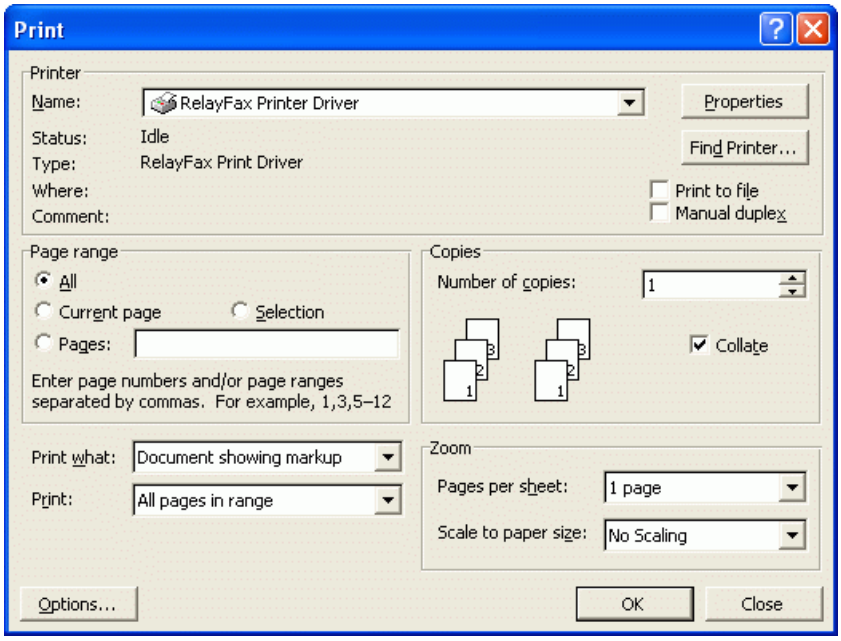
13.5 Working with Faxes

13.5.1 RelayFax Printer Driver



With the RelayFax Printer Driver you can fax documents directly from within the applications that you use to create them. You can do this by printing the document to the RelayFax Printer Driver instead of to your usual printer. After setting the desired parameters, click OK and then the client's Compose Fax dialog will be opened automatically for completing the fax.

During installation, the RelayFax Printer Driver's default settings will be set to the proper resolution. Exercise caution in changing these settings. Failure to properly configure the printer driver will result in improperly formatted fax images that appear out of scale or otherwise deformed.

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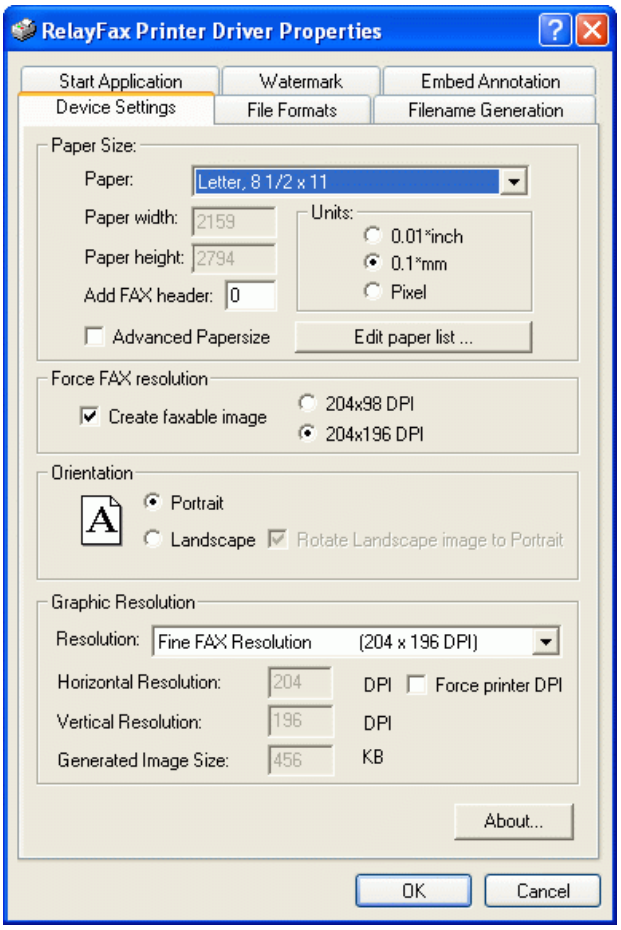
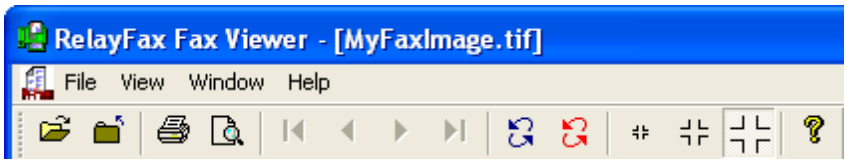


See also:

[Compose Fax Dialog](#) 141

13.5.2 Viewing, Printing, and Editing Faxes



Installing the RelayFax SMTP Client on a workstation will also install the RelayFax Fax Viewer - a simple utility for viewing and printing fax images. This utility will be associated with the proper extensions for opening and printing TIF documents. If an existing software package is found associated with the TIF extension, that registry entry will be saved under the "edit" shell command. Use the arrow keys to move from page to page in a multi-page fax.

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13.5.3 Sending a Fax via an Email Client

13.5.3.1 Sending a Fax via an Email Client

Most of the time a fax will be created by printing to the RelayFax Printer Driver from within a Windows application. However, it is possible and sometimes most effective to simply load up your email client and directly generate a message to be faxed. This is done by composing your email message and addressing it to one of the email accounts that you know RelayFax is monitoring. For example, if RelayFax is collecting all the email messages sent to FaxServer@example.com then sending your message to that address will get it faxed. Several special considerations must be observed in order to use this method of faxing.

Including a Fax Number in the TO: Header

When you address your email message you can specify just a fax number on the TO: line like this:

```
"555-1212" <FaxServer@example.com>
```

You can also specify the recipient's name, company information, and fax number like this:

```
"555-1212, Jeff Boyd, Forest Park Lanes" <FaxServer@example.com>
```

Note how each part within the quotations is separated by a comma. The format is like this:

```
[Open Quote]FAX NUMBER[Comma]PERSONAL NAME[Comma]COMPANY NAME[Close
Quote]
```

Because the various sections are separated by a comma, you will need to enclose in quotation marks any field value that contains a comma. For example:

```
"555-1212, "Boyd, Jeff", "Alt-N Technologies, Ltd.""
<FaxServer@example.com>
```

Finally, you can specify just the recipient's fax number and company name like this:

```
"555-1212, , "Alt-N Technologies, Ltd."" <FaxServer@example.com>
```

Using a Fax Number in the Email Address

Your fax server/mail server configuration may have an entire domain (e.g. "fax.example.com") dedicated to fax messages, allowing a fax number to be used as the mailbox portion of the email address itself. If that is the case then you would format the email address like this:

```
"Frank Thomas, Example Co." <5551212@fax.example.com>
```

See:

Email Macros 159
Attaching Documents to Fax Messages 159

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13.5.3.2 Attaching Documents to Fax Messages

The RelayFax Server has the ability to extract attachments and fax them automatically. For example, it is possible for you to send an email message to the RelayFax Server which contains an Excel or Word document as an attachment. The RelayFax Server will extract the document, invoke the associated application to print it and then fax the resulting image. Any number of separate attachments can be attached and faxed in this manner. Page breaks within any given document will be honored and cause multiple pages to be faxed.

When you send a fax through an email message and not through the printer driver, the text of your mail will be placed in the comments section of the cover page if the cover page exists and the length of the text of your message is less than 1000 characters. However, page breaks within the body of the email message will be honored and cause RelayFax to generate multiple faxed pages rather than just a cover page.

See Also:

Attached Documents 153
Attachment Faxing 62

13.5.3.3 Email Macros

When RelayFax processes an email message in preparation for faxing, it examines the message to determine where and to whom the fax should be sent. Most of the time this information will be specified on the TO: line, however it is possible to specify several key items within the email message itself. The following special macros can be placed within the body of an email message to achieve specific results. Each macro must appear on its own line and at the top of the message body:

AUTOEXTRACT: true	This macro tells the RelayFax Server to perform OCR on the attached TIF file and search for faxnumbers.
AUTOEXTRACTKEY: true	If AUTOEXTRACT is true, then this macro contains the string to search for when looking for recipient fax numbers.
AUTOEXTRACTNAME: true	If AUTOEXTRACT is true, then this macro contains the string to search for when looking for the recipient name.

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AUTOEXTRACTCOMPANY: true	If AUTOEXTRACT is true, then this macro contains the string to search for when looking for the recipient company name.
AUTOEXTRACTFILE: true	If AUTOEXTRACT is true, then this macro contains the string to search for when looking for the name of a comment file to include on the cover page.
AUTOEXTRACTSUBJECT: true	If AUTOEXTRACT is true, then this macro contains the string to search for when looking for the fax subject.
AUTOEXTRACTEACHPAGESEPARATE: true	If AUTOEXTRACT is true, this macro processes each page of the attached TIF separately. This option is used when each page of a single printout should be sent to a separate user.
EMAILTO: user@example.com	This macro specifies an email address to which to send a copy of the fax. You can include any number of these macros. Each email recipient receives a customized cover page, and the fax document will be attached in the image format designated in Imaging Options 71.
FAXPASSWORD: Password	Used for including your fax password within the message. If RelayFax is configured to require a password then you must use this macro to include it, when sending a fax via an email client.
FAXID: Text	This macro specifies the fax ID used when RelayFax sends a fax. This information is transmitted to the receiving fax machine.
FAXSUBJECT: Text	This macro specifies the subject of the fax to "Text". This information appears on the cover page.
FROMNAME: Text	This macro specifies real name of the sender of the fax to "Text".

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FROMLINE: Text -or- FROMADDRESS: Text	Either of these macros specifies the email address of the sender of the fax. The value must be an email address.
FAXNUMBER: Parms	This macro specifies the one fax recipient. 'Parms' can specify a fax number only or a fax number + recipient name + recipient company name. Ex: 555-1212 Or 555-1212, Jerry Donald, Alt-N Tech Or 555-1212, "Hathcock, Arvel", "Alt-N Tech, LTD."
STREET1:Text	The sender's street address.
STREET2:Text	The sender's secondary address, or second line of their street address.
CITY:Text	The sender's city.
STATE:Text	The sender's state or province.
ZIP:Text	Sender's zip or postal code.
ZIPCITY: true	This macro specifies the order used in the sender's address. If "true," then the order is zip, city, and state. The default is "false": city, state, and zip.
HOMEPHONE:Text	This is the sender's home telephone number.
HOMEFAX:Text	This is the sender's home fax number.
BUSPHONE:Text	The sender's business phone number.
BUSFAX:Text	Sender's business fax number.

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BILLINGCODE:Text	The billing code of the sender.
CCNUMBER: Parms	Use this macro to specify additional fax recipients. You can use as many of these macros as you need. Specify a single recipient per macro. 'Parms' can specify a fax number only or a fax number + recipient name + recipient company name. Ex: 555-1212 Or 555-1212, Jerry Donald, Alt-N Tech Or 555-1212, "Hathcock, Arvel", "Alt-N Tech, LTD."
PORT: Number	This macro specifies the port that the fax should be sent on. Use care to ensure that you specify a valid port.
FROMCOMPANY: Text	This macro specifies the company name of the sender of the fax.
FROMPHONE: Text	This macro specifies the voice telephone number of the sender of the fax. This is the voice number value that is used in RelayFax's template files.
FROMFAX: Text	This macro specifies the fax number of the sender of the fax (typically the RelayFax Server's fax number).
CONFIRMSEND: true	This macro specifies that the sender of the fax wishes to receive a confirmation message when the fax has been successfully sent. The value of this macro should be the word "true".
ATTACHMENT: Path	Causes the attachment specified in the path to be included in the fax message. The file path must be accessible to the RelayFax server for it to be attached.

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COVERPAGE: Path	This macro specifies the cover page that will be used for this fax. "Path" must specify a valid .COV file accessible to the RelayFax Server.
PREFIX: Text	This macro specifies a prefix to the fax number such as "*70" or "9,".
IGNOREBODY:	This macro prevents RelayFax from including the email body in the comments field. The body is still scanned for macros.
COMMENTS: Text	This macro specifies the text that will appear in the NOTES or COMMENTS section of the cover page. You can specify more than one line of comment text by placing "%e" into the text where a line break should appear.
SCHEDULE: mm/dd/yyyy ##:## am/pm	Designates a specific date and time to send the fax. Example: SCHEDULE: 01/01/2001 05:30 PM NOTE: The day and date parameters must be two characters: 01, 02, etc. The year must be four. The hour must be 01-12 with AM or PM following the minutes.
PRIORITY: 00-100	Sets a priority value for the fax. 00 is the highest priority and 100 is the lowest. Messages will always be faxed in the order of their priority setting. When no priority setting is present, they will be treated as "normal" with a setting of 50.
WAITFORANSWER: Number	This macro specifies how long RelayFax will wait for the receiving fax machine to answer. This is a value in seconds.
RETRYATTEMPTS: Number	This macro specifies how many times RelayFax will retry a failed fax attempt.
RETRYDELAY: Number	This macro specifies the number of seconds RelayFax will wait between subsequent fax

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	attempts.
NOCOVERPAGE: true	This macro will prevent RelayFax from generating a dynamic cover page and sending it along with your fax. This is useful for situations in which you either do not want a cover page or the first printed page of your document is the cover page for the fax.
BANNERTEXT: Text	This macro specifies the text that appears at the top of each faxed page. You can use the special banner characters here. See the Banner Text & Formatting Characters 42 for more information.

```
---Example Start---

From: Frank.Thomas@example.com
To: "555-1212, Eddie Filewood, "Forest Park Lanes, Front Desk""
<RelayFax@example.com>
Subject: My time.

FROMNAME: Frank Thomas
FROMCOMPANY: Forest Park Lanes, Inc.
PRIORITY: 00
COMMENTS: Say, hit me in! I be in ina minute. %e Tell me I'm a lyin'. %
e Frank

---Example End---
```

13.5.3.4 Banner Text & Formatting Characters

RelayFax will insert a line of text at the top of each faxed page. This line is called a banner. With RelayFax it is possible to custom format your banner to automatically include various kinds of information such as the date and time, total pages, recipient's or sender's name, your fax device's identifier (CSID), and various other options.

By inserting special formatting characters into the banner, you may automatically include some information concerning the fax. See the list below for descriptions of these characters.

Although the banner may be any length, only one line will appear at the top of a fax. This line may consist of up to three parts. These parts are a left-justified portion, a center-justified portion, and a right-justified portion. Each part is separated by the vertical bar character ("|"). Since none of these areas are limited in size, there is the potential that they may at times overwrite one another.

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If the banner option is left blank no fax banner will be sent. However, it is common practice to include a banner on outgoing faxes, and in some regions it is even required.

RelayFax Banner Formatting Characters

The following is a glossary of all valid formatting characters that may be used in the RelayFax Banner:

- **%d** = date in short format
- **%D** = date in long format
- **%t** = send time (24 hour format, e.g. 1:00pm = 13:00:00)
- **%p** = total number of pages in the fax
- **%c** = current page

- **%r** = Recipient's Name
- **%y** = Recipient's Company
- **%s** = Sender's Name
- **%m** = Sender's Company
- **%i** = Sender's Fax ID
- **%u** = Subject of Fax
- **%f** = Recipient's Fax Number
- **%o** = Comments
- **%x** = Sender's Fax Number
- **%h** = Sender's Voice Number
- **%T** = Tracking Number

Inbound Banner Formatting Characters

On the Default Rules 84 pane of the Mail Sources and Rules dialog, you can configure RelayFax to add a banner to inbound faxes. The following formatting characters can be used in that feature:

%d = date in short format

%D = date in long format

%t = send time (24 hour format, e.g. 1:00pm = 13:00:00)

%p = total number of pages in the fax

%c = current page

%r,**%f** = DID number if available, otherwise received port

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%s = Caller ID information if available, otherwise Sender's Fax ID

%i = Sender's Fax ID

%T = Tracking Number

13.5.4 Advanced Features

13.5.4.1 Sending Faxes Programmatically

Your custom application can use the RelayFax system to send a fax by observing the following steps:

Set the following parameters in the FAXCLNT.INI file under the [FAXPARMS] section. This file can be found in the \Application Data\RelayFax\ subdirectory of the user's profile (e.g. Documents and Settings in Windows 2000/XP).

- LastFaxNumber=555-1212 ; set the fax number here
- LastRecipientName=Arvel Hathcock ; set the recipient's name here
- LastRecipientCompany=Alt-N Tech ; set the recipient's company here
- LastFaxSubject=Sample Subject ; set the subject of the fax message here
- LastComments=This is%ea comment ; comments for cover page (%e = line break)
- LastEmailAddress=FaxServer@mycompany.com ; address of RelayFax Server's email account.
- ConfirmSend=Yes (or No) ; request a send confirmation
- NoCoverPage=Yes (or No) ; use a cover page?
- DefaultCoverPage=Yes (or No) ; user server assigned cover page
- SpecificCoverPage=Yes (or No) ; use a specific cover page
- LastCoverPage=FILENAME ; filename of specific cover page to use
- VerifyTransfer=Yes (or No) ; view mail sessions in progress

Once the above parameters are set to your liking, set the following key to activate automatic faxing: AutoFax=Yes (or No)

If the AutoFax key is set to Yes the RelayFax SMTP Client will create and spool the next printed document sent to the RelayFax Printer Driver automatically without prompting the user for any information. After doing so the RelayFax SMTP Client will reset the AutoFax key to No.

When specifying the LastCoverPage key use only the name of the cover page file – not the complete path to the file itself. The Client will assume the file is located in the Cover Page Directory.

Also, the NoCoverPage, DefaultCoverPage, and SpecificCoverPage keys work together. Only one can be set to Yes. The others must be set to No. An error will result if more than one of these keys are set to Yes at the same time.

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13.5.4.2 Using the Broadcast Fax Wizard

The RelayFax SMTP Client's broadcasting wizard makes sending a fax to multiple recipients or a distribution list simple. By stepping through the wizard one screen at a time and providing a few pieces of information, you can send a fax to any number of recipients — listed either in a text file or by acquiring them directly from an ODBC accessible database.

In the wizard you will choose: The text file containing the fax recipients, whether or not you want the fax to be "cover page only", the fax image to send, the cover page to use, the template to use, and some sender information. If you want to build the recipient list from an ODBC accessible database instead of a text file, you can step through an additional wizard 172 in the middle of this process that will enable you to do so.

This feature may not be available to all users. The administrator must grant your account permission before you will be able to use the client to send broadcast faxes.

Broadcast Fax Wizard Step-by-Step

Step 1—Prepare the recipient list

Prepare a text file or database that contains the fax numbers and names to which you wish to send the fax. Remember where this file or database is located. The format of the text file must be as follows:

The file must contain no more than one fax number per line but each line can also contain the recipient's name and company information. Lines beginning with "#" or ";" are ignored to allow you to put comments throughout the file as necessary. Here are some examples:

`555-1212`	Only the fax number is specified
`555-1212, Arvel Hathcock`	Fax number and recipient name specified
`555-1212, Arvel Hathcock, Alt-N Technologies`	Fax number, name, and company specified
`555-1212, Arvel Hathcock, "Alt-N Tech, LTD."`	Fax parameters may contain commas if quoted
`555-1212, , Alt-N Technologies`	Only fax number and company specified

If you want to build the list automatically from a database then the database must first be included in your Windows ODBC Data Source Administrator. This is located in either the Control Panel or Administrative Tools under the Control Panel, depending upon which version of Windows you are using.

If building the list from your fax contacts or address book, you will choose the list of

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recipients in **Step 3** below.

Step 2—Open the Broadcast Fax Wizard

Right-click the RelayFax SMTP Client tray icon, and choose *"Send broadcast fax..."*.

Step 3—Choose the recipient list or build it from a database

Click *Browse* and navigate to the text file containing the fax numbers, or click *Contacts* to choose the recipients from the contact manager or address book. If you want to build the list from a database then click *ODBC data source*, which will launch the ODBC Selector Wizard 172 . After this step is completed, the wizard will display the first several entries to which the broadcast fax will be sent. Click *Next*.

Broadcast Fax Wizard
Select the file which contains the fax numbers for this broadcast fax event.
C:\Program Files\RelayFax\App\My_Broadcast_Fax_01.txt
Browse
Contacts
ODBC data source
Sample data from source
817-555-0101, Frank Thomas, Global Domination Co.
111-555-1234, Peepoe Papaleemo, "Farfull Farfull Pipick, Inc
212-555-2345, Harcourt Fenton Mudd, Galactic Cosmetics
222-555-1111, Rip Collector, "Found-A-Penny, Ltd."
555-0099, Mr. Big, Cheezcom
555-2323, Dwimble T. Fearless, "Blitz's Fault Co."
< Back
Next >
Cancel
Help

Step 4—Choose the fax image or document that will be sent

Click *Browse* and navigate to the fax image or document that you wish to send, or click the checkbox next to *"This broadcast fax consists of a cover page only"* if want to send only a cover page (the cover page will be chosen in the next step). If you have selected a file to send and you want the client to convert the document for you before sending it (rather than letting the fax server convert it for you), click *"Convert document to TIFF format before sending."* Click *Next*.

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Broadcast Fax Wizard
Select the fax image file you wish to use for this broadcast fax event. You can also select a Microsoft Office document or any other document eligible for attachment faxing.
C:\Program Files\RelayFax\App\My_Broadcast_Fax_01.do
Browse
View
Convert document to TIFF format before sending
This broadcast fax consists of a cover page only.
< Back
Next >
Cancel
Help

Step 5—Choose the cover page

Choose the cover page for the fax. If you need to create a new cover page or edit an existing one, click *Advanced* to open the Cover Page 145 dialog. If you don't want to include a cover page with the broadcast fax then click the checkbox next to *"I do not wish to use a cover page"*. Click *Next*.

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Broadcast Fax Wizard
Select the cover page to use for this broadcast fax event.
ACCOUNTING.COV
CONFIDENTIAL.cov
FOR YOUR INFORMATION.cov
GENERIC.cov
URGENT!.cov
Advanced
Subject text for cover page
I built a computer in my garage!
Comments for cover page (1000 chars max)
Say, this is to let all of you know that I built a computer from scratch in my garage! I made it all...even the CPU and circuitry, which I made out of bolts and duct tape. --Frank T.
I do not wish to use a cover page.
< Back
Next >
Cancel
Help

Step 6—Enter the sender information

1. Enter the sender's name.
2. Enter the sender's email address. RelayFax will send any system or error messages regarding the broadcast to this address.
3. Enter a billing code for the broadcast, or leave it set to <Default>.
4. Specify a priority value from "0" to "100" for this broadcast. The order in which faxes are sent is determined by their priority value—"0" being the highest priority and "100" being the lowest. The default value for normal faxes is "50". The default value for broadcast faxes is "80". If you want normal faxes to be sent before the broadcast fax then specify a number greater than 50 in this control. Further, if you do not want broadcast faxes to count against the "`MaxPendingFaxCount=`" value in the `RelayFax.ini` file, then you must designate a priority value between "80" and "100".
5. Click *Next*.

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Step 7—Begin the broadcast

Click *Finish* to start broadcasting your fax.

Broadcast Fax Wizard
Your broadcast fax is ready to send.
Press "Finish" to send the fax broadcast request to the RelayFax server.
Finish
Cancel
Help

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See also:

ODBC Selector Wizard 172

13.5.4.3 ODBC Selector Wizard

If you choose to build the Broadcast Fax recipient list from a database instead of a previously prepared text file, use the following steps to do so:

Step 1—Prepare your database

Prepare your database making sure that the table from which you wish to build the list contains fields for each recipient's fax number, name, and company. Add the database to your Windows ODBC Data Source Administrator. ODBC Data Source is located in either the Control Panel or Administrative Tools under the Control Panel, depending upon which version of Windows you are using.

Step 2—Open the Broadcast Fax Wizard

Right-click the RelayFax SMTP Client tray icon and click "*Send broadcast fax...*". This will open the Broadcast Fax Wizard.

Step 3-Open the ODBC Selector Wizard

In the Broadcast Fax Wizard, click "*ODBC data source*" to open the ODBC Selector Wizard.

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Step 4—Choose the data source

This dialog lists all data sources currently included in the ODBC Data Source Administrator. Click the data source that contains the table that will be used to build your list. If a logon and password is required to gain access to the data source then include that information on this dialog as well. Click "Next".

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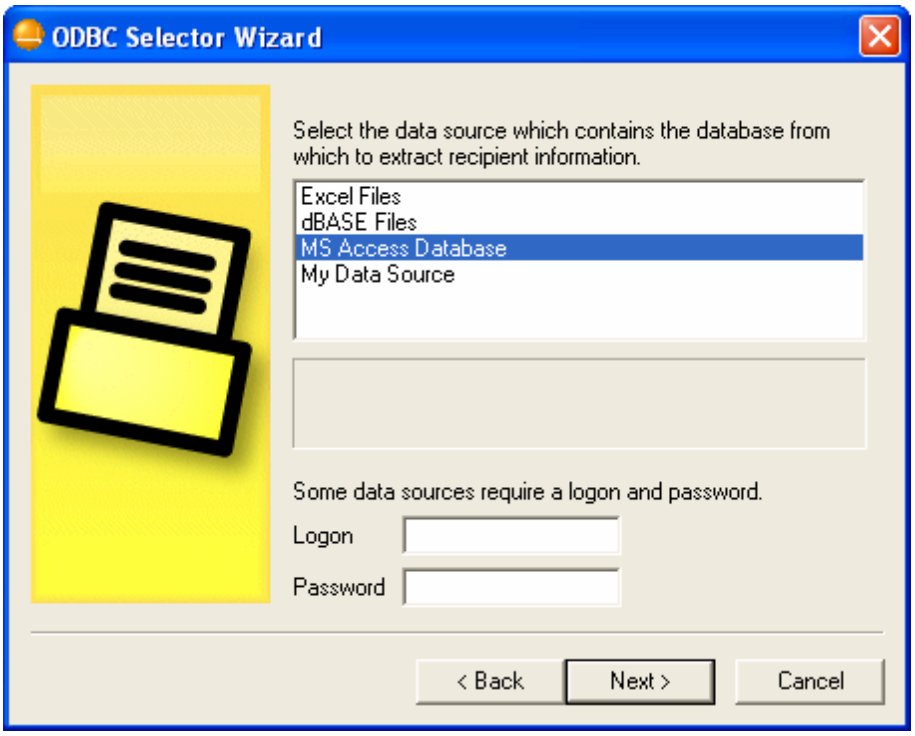

Step 5—Select the table containing the recipient information

This dialog lists the tables contained in the chosen database. Click the table that contains the fields that you wish to use to build your recipient list. Click "Next".

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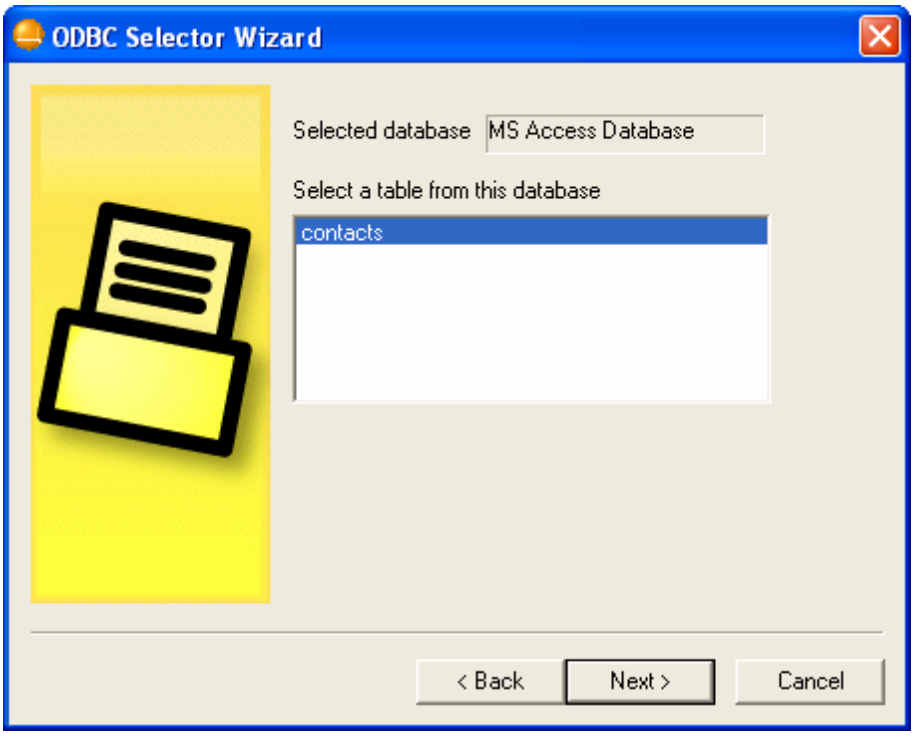

Step 6—Select the columns to use

Use the drop-down list boxes to select the database columns that you wish to use to build your list of recipients. Select columns that correspond to the recipient fax number, name, and company. Name fields 2 and 3 are optional. If your database contains a single column for Name, then you can assign it to Name field 1 and leave the others blank. This dialog also contains an optional control that can be used to enter an SQL SELECT statement "WHERE" clause if necessary. Click "Next". The recipient list will be built and you will be returned to the Broadcast Fax Wizard.

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Step 7—Continue in the Broadcast Fax Wizard

Go to step 3 in the Broadcast Fax Wizard 167 and continue normally from that point forward.

See also:

Using the Broadcast Fax Wizard 167

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Section

14 Fax Broadcasting

14.1 Using the Broadcast Fax Wizard

RelayFax's broadcasting wizard makes sending a fax to multiple recipients or a distribution list simple. By stepping through the wizard one screen at a time and providing a few pieces of information, you can send a fax to any number of recipients — listed either in a text file or by acquiring them directly from an ODBC accessible database.

In the wizard you will choose: The text file containing the fax recipients, whether or not you want the fax to be "cover page only", the fax image to send, the cover page to use, the template to use, and some sender information. If you want to build the recipient list from an ODBC accessible database instead of a text file, you can step through an additional wizard 185 in the middle of this process that will enable you to do so.

Once the broadcast fax begins, RelayFax will queue some of the faxes into the Fax Log Window so that you can see its status at any time. As the broadcast continues, RelayFax will constantly monitor the progress — remembering where it is in the list and which faxes have been completed. If the broadcast is interrupted due to a power failure or shutting down the server, the broadcast fax will be continued from the point at which it was left off as soon as RelayFax is launched.

One additional note: When the broadcast is finished, you can utilize RelayFax's exporting features coupled with your database or spreadsheet application to create a list of the numbers that failed to receive the fax. You can then use that information to update your database or resend the fax to only those numbers.

Broadcast Fax Wizard Step-by-Step

Step 1—Prepare the recipient list 178
Step 2—Open the Broadcast Fax Wizard 179
Step 3—Choose the recipient list or build it from a database 179
Step 4—Choose the fax image or document that will be sent 180
Step 5—Choose the cover page 181
Step 6—Choose the Fax Template 182
Step 7—Enter the sender information 183
Step 8—Begin the broadcast 184

Step 1—Prepare the recipient list

Prepare a text file or database that contains the fax numbers and names to which you wish to send the fax. Remember where this file or database is located. The format of the text file must be as follows:

The file must contain no more than one fax number per line but each line can also contain the recipient's name and company information. Lines beginning with "#" or ";" are ignored to allow you to put comments throughout the file as necessary. Here are

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some examples:

`555-1212`	Only the fax number is specified
`555-1212, Arvel Hathcock`	Fax number and recipient name specified
`555-1212, Arvel Hathcock, Alt-N Technologies`	Fax number, name, and company specified
`555-1212, Arvel Hathcock, "Alt-N Tech, LTD."`	Fax parameters may contain commas if quoted
`555-1212, , Alt-N Technologies`	Only fax number and company specified

If you want to build the list automatically from a database then the database must first be included in your Windows ODBC Data Source Administrator. This is located in either the Control Panel or Administrative Tools under the Control Panel, depending upon which version of Windows you are using.

If building the list from your fax contacts or address book, you will choose the list of recipients in Step 3 179 below.

Step 2—Open the Broadcast Fax Wizard

In RelayFax, click *"Create broadcast fax..."* on the Tools menu, or click the Broadcast Fax icon on the toolbar. This will open the Broadcast Fax Wizard.

Step 3—Choose the recipient list or build it from a database

Click *Browse* and navigate to the text file containing the fax numbers, or click *Contacts* to choose the recipients from the contact manager or address book. If you want to build the list from a database then click *ODBC data source*, which will launch the ODBC Selector Wizard 185. After this step is completed, the wizard will display the first several entries to which the broadcast fax will be sent. Click *Next*.

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Broadcast Fax Wizard
Select the file which contains the fax numbers for this broadcast fax event.
C:\Program Files\RelayFax\App\My_Broadcast_Fax_01.txt
Browse
Contacts
ODBC data source
Sample data from source
817-555-0101, Frank Thomas, Global Domination Co.
111-555-1234, Peepoe Papaleemo, "Farfull Farfull Pipick, Inc
212-555-2345, Harcourt Fenton Mudd, Galactic Cosmetics
222-555-1111, Rip Collector, "Found-A-Penny, Ltd."
555-0099, Mr. Big, Cheezcom
555-2323, Dwimble T. Fearless, "Blitz's Fault Co."
< Back
Next >
Cancel
Help

Step 4—Choose the fax image or document that will be sent

Click *Browse* and navigate to the fax image or document that you wish to send, or click the checkbox next to *"This broadcast fax consists of a cover page only"* if wish to send only a cover page (the cover page will be chosen in the next step). Click *Next*.

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Broadcast Fax Wizard
Select the fax image file you wish to use for this broadcast fax event. You can also select a Microsoft Office document or any other document eligible for attachment faxing.
:\Program Files\RelayFax\App\My_Broadcast_Fax_01.doc
Browse
View
Convert document to TIFF format before sending
This broadcast fax consists of a cover page only.
< Back
Next >
Cancel
Help

Step 5—Choose the cover page

Choose the cover page for the fax. If you need to create a new cover page or edit an existing one, click *Advanced* to open the Cover Page 106 dialog. If you don't want to include a cover page with the broadcast fax then click the checkbox next to *"I do not wish to use a cover page"*. Click *Next*.

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Broadcast Fax Wizard
Select the cover page to use for this broadcast fax event.
ACCOUNTING.COV
CONFIDENTIAL.cov
FOR YOUR INFORMATION.cov
GENERIC.cov
URGENT!.cov
Advanced
Subject text for cover page
I built a computer in my garage!
Comments for cover page (1000 chars max)
Say, this is to let all of you know that I built a computer from scratch in my garage! I made it all...even the CPU and circuitry, which I made out of bolts and duct tape. --Frank T.
I do not wish to use a cover page.
< Back
Next >
Cancel
Help

Step 6—Choose the fax template

Choose the fax template to use. If you need to create a new template or edit an existing one, click *Advanced* to open the Templates dialog . If you don't want to use a template with the broadcast fax then click the checkbox next to *"I do not wish to use a fax template."* When you choose not to use a template RelayFax's default settings will be used instead. Click *Next*.

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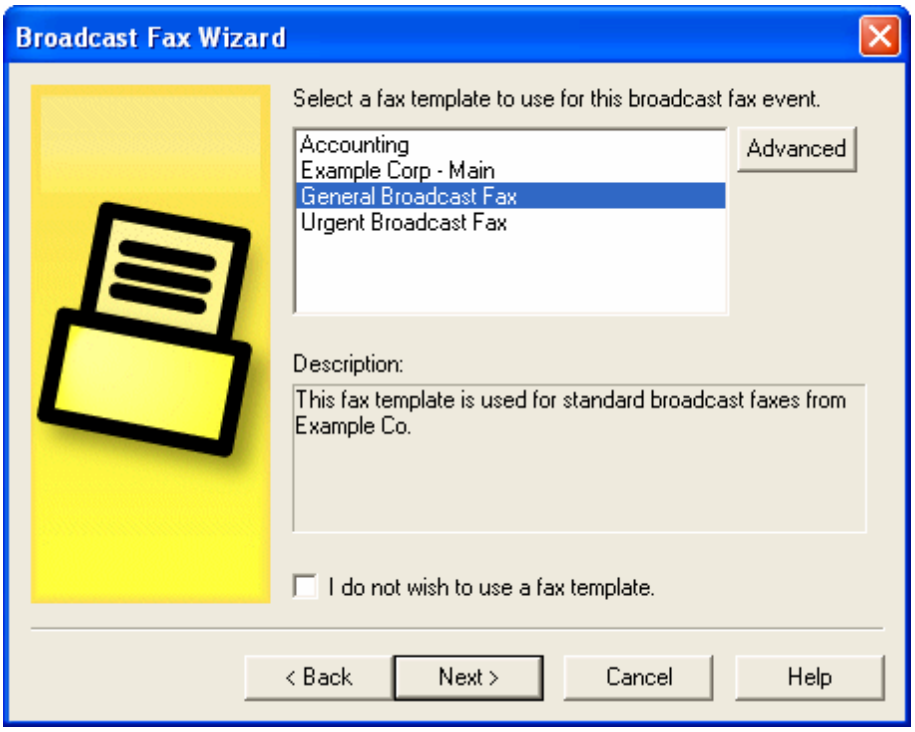
Broadcast Fax Wizard
Select a fax template to use for this broadcast fax event.
Accounting
Example Corp - Main
General Broadcast Fax
Urgent Broadcast Fax
Advanced
Description:
This fax template is used for standard broadcast faxes from Example Co.
I do not wish to use a fax template.
< Back
Next >
Cancel
Help

Step 7—Enter the sender information

1. Enter the sender's name.
2. Enter the sender's email address. RelayFax will send any system or error messages regarding the broadcast to this address.
3. Enter a billing code for the broadcast, or leave it set to <Default>.
4. Specify a priority value from "0" to "100" for this broadcast. The order in which faxes are sent is determined by their priority value, "0" being the highest priority and "100" being the lowest. The default value for normal faxes is "50". The default value for broadcast faxes is "80". If you want normal faxes to be sent before the broadcast fax then specify a number greater than 50 in this control. Further, if you do not want broadcast faxes to count against the "`MaxPendingFaxCount=`" value in the `RelayFax.ini` file, then you must designate a priority value between "80" and "100".
5. Click *Next*.

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Step 8—Begin the broadcast

Click *Finish* to start broadcasting your fax.

Broadcast Fax Wizard
Your broadcast fax is ready to send.
Press "Finish" to send the fax broadcast request to the RelayFax server.
Finish
Cancel
Help

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See also:

ODBC Selector Wizard 185

14.2 ODBC Selector Wizard

If you choose to build the Broadcast Fax recipient list from a database instead of a previously prepared text file, use the following steps to do so:

Step 1—Prepare your database

Prepare your database making sure that the table from which you wish to build the list contains fields for each recipient's fax number, name, and company. Add the database to your Windows ODBC Data Source Administrator. ODBC Data Source is located in either the Control Panel or Administrative Tools under the Control Panel, depending upon which version of Windows you are using.

Step 2—Open the Broadcast Fax Wizard

In RelayFax, click "Create broadcast fax..." on the "Tools" menu, or click the Broadcast Fax icon on the toolbar.

Step 3-Open the ODBC Selector Wizard

In the Broadcast Fax Wizard, click "*ODBC data source*" to open the ODBC Selector Wizard.

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Step 4—Choose the data source

This dialog lists all data sources currently included in the ODBC Data Source Administrator. Click the data source that contains the table that will be used to build your list. If a logon and password is required to gain access to the data source then include that information on this dialog as well. Click "Next".

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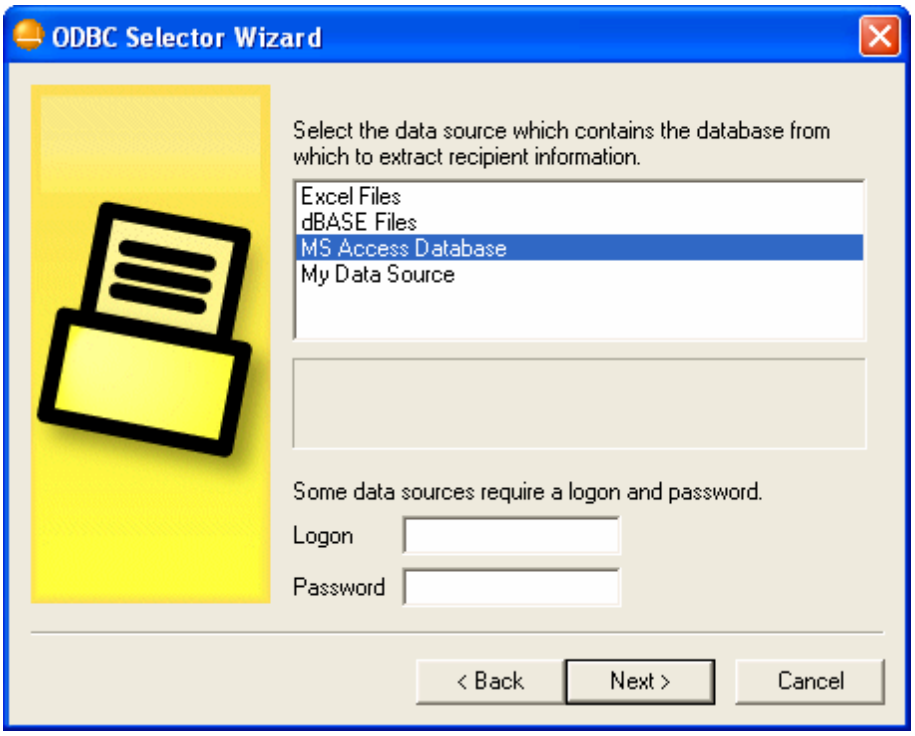

Step 5—Select the table containing the recipient information

This dialog lists the tables contained in the chosen database. Click the table that contains the fields that you wish to use to build your recipient list. Click "Next".

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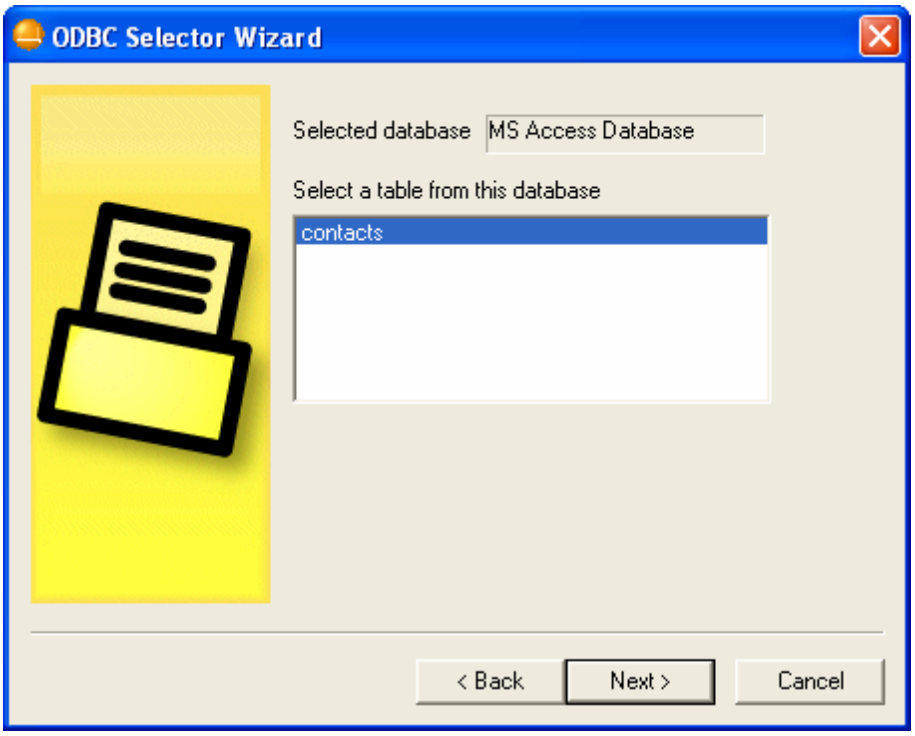

Step 6—Select the columns to use

Use the drop-down list boxes to select the database columns that you wish to use to build your list of recipients. Select columns that correspond to the recipient fax number, name, and company. Name fields 2 and 3 are optional. If your database contains a single column for Name, then you can assign it to Name field 1 and leave the others blank. This dialog also contains an optional control that can be used to enter an SQL SELECT statement "WHERE" clause if necessary. Click "Next". The recipient list will be built and you will be returned to the Broadcast Fax Wizard.

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Step 7—Continue in the Broadcast Fax Wizard

Go to step 3 in the Broadcast Fax Wizard 179 and continue normally from that point forward.

See also:

Using the Broadcast Fax Wizard 178

14.3 Canceling a Broadcast Fax

You can cancel a broadcast fax at any time from the Tools » Cancel broadcast fax... menu selection, or by clicking the "Cancel broadcast fax" button on the toolbar. This will prevent RelayFax from queuing any more faxes for the broadcast. However, any faxes that are pending in the Log Window before the button is pressed will still be sent normally. This option will not be available when there is no broadcast in progress.

Canceling a broadcast is a final decision. The broadcast cannot be resumed once it has been canceled.

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14.4 Pausing a Broadcast Fax

You can pause the broadcast fax at any time by clicking the Disable Modems button on the toolbar. If RelayFax is currently sending a fax when the button is pressed, it will complete the fax before pausing. As long as the button remains depressed RelayFax will not send any more faxes on any modems. Click the button again to resume faxing.

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Section XV

15 RelayFax Macros

15.1 Email Macros

When RelayFax processes an email message in preparation for faxing, it examines the message to determine where and to whom the fax should be sent. Most of the time this information will be specified on the TO: line, however it is possible to specify several key items within the email message itself. The following special macros can be placed within the body of an email message to achieve specific results. Each macro must appear on its own line and at the top of the message body:

AUTOEXTRACT: true	This macro tells the RelayFax Server to perform OCR on the attached TIF file and search for faxnumbers.
AUTOEXTRACTKEY: true	If AUTOEXTRACT is true, then this macro contains the string to search for when looking for recipient fax numbers.
AUTOEXTRACTNAME: true	If AUTOEXTRACT is true, then this macro contains the string to search for when looking for the recipient name.
AUTOEXTRACTCOMPANY: true	If AUTOEXTRACT is true, then this macro contains the string to search for when looking for the recipient company name.
AUTOEXTRACTFILE: true	If AUTOEXTRACT is true, then this macro contains the string to search for when looking for the name of a comment file to include on the cover page.
AUTOEXTRACTSUBJECT: true	If AUTOEXTRACT is true, then this macro contains the string to search for when looking for the fax subject.
AUTOEXTRACTEACHPAGESEPARATE: true	If AUTOEXTRACT is true, this macro processes each page of the attached TIF separately. This option is used when each page of a single printout should be sent to a separate user.
EMAILTO: user@example.com	This macro specifies an email address to which to send a copy of the fax. You can include any

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	number of these macros. Each email recipient receives a customized cover page, and the fax document will be attached in the image format designated in Imaging Options 71.
FAXPASSWORD: Password	Used for including your fax password within the message. If RelayFax is configured to require a password then you must use this macro to include it, when sending a fax via an email client.
FAXID: Text	This macro specifies the fax ID used when RelayFax sends a fax. This information is transmitted to the receiving fax machine.
FAXSUBJECT: Text	This macro specifies the subject of the fax to "Text". This information appears on the cover page.
FROMNAME: Text	This macro specifies real name of the sender of the fax to "Text".
FROMLINE: Text -or- FROMADDRESS: Text	Either of these macros specifies the email address of the sender of the fax. The value must be an email address.
FAXNUMBER: Parms	This macro specifies the one fax recipient. 'Parms' can specify a fax number only or a fax number + recipient name + recipient company name. Ex: 555-1212 Or 555-1212, Jerry Donald, Alt-N Tech Or 555-1212, "Hathcock, Arvel", "Alt-N Tech, LTD."
STREET1:Text	The sender's street address.
STREET2:Text	The sender's secondary address, or second line of their street address.

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CITY:Text	The sender's city.
STATE:Text	The sender's state or province.
ZIP:Text	Sender's zip or postal code.
ZIPCITY: true	This macro specifies the order used in the sender's address. If "true," then the order is zip, city, and state. The default is "false": city, state, and zip.
HOMEPHONE:Text	This is the sender's home telephone number.
HOMEFAX:Text	This is the sender's home fax number.
BUSPHONE:Text	The sender's business phone number.
BUSFAX:Text	Sender's business fax number.
BILLINGCODE:Text	The billing code of the sender.
CCNUMBER: Parms	Use this macro to specify additional fax recipients. You can use as many of these macros as you need. Specify a single recipient per macro. `Parms' can specify a fax number only or a fax number + recipient name + recipient company name. Ex: 555-1212 Or 555-1212, Jerry Donald, Alt-N Tech Or 555-1212, "Hathcock, Arvel", "Alt-N Tech, LTD."
PORT: Number	This macro specifies the port that the fax should be sent on. Use care to ensure that you specify a valid port.

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FROMCOMPANY: Text	This macro specifies the company name of the sender of the fax.
FROMPHONE: Text	This macro specifies the voice telephone number of the sender of the fax. This is the voice number value that is used in RelayFax's template files.
FROMFAX: Text	This macro specifies the fax number of the sender of the fax (typically the RelayFax Server's fax number).
CONFIRMSEND: true	This macro specifies that the sender of the fax wishes to receive a confirmation message when the fax has been successfully sent. The value of this macro should be the word "true".
ATTACHMENT: Path	Causes the attachment specified in the path to be included in the fax message. The file path must be accessible to the RelayFax server for it to be attached.
COVERPAGE: Path	This macro specifies the cover page that will be used for this fax. "Path" must specify a valid .COV file accessible to the RelayFax Server.
PREFIX: Text	This macro specifies a prefix to the fax number such as "*70" or "9,".
IGNOREBODY:	This macro prevents RelayFax from including the email body in the comments field. The body is still scanned for macros.
COMMENTS: Text	This macro specifies the text that will appear in the NOTES or COMMENTS section of the cover page. You can specify more than one line of comment text by placing "%e" into the text where a line break should appear.
SCHEDULE: mm/dd/yyyy ##:## am/pm	Designates a specific date and time to send the fax.

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Example: SCHEDULE: 01/01/2001 05:30 PM

NOTE: The day and date parameters must be two characters: 01, 02, etc. The year must be four. The hour must be 01-12 with AM or PM following the minutes.

PRIORITY: 00-100

Sets a priority value for the fax. 00 is the highest priority and 100 is the lowest. Messages will always be faxed in the order of their priority setting. When no priority setting is present, they will be treated as "normal" with a setting of 50.

WAITFORANSWER: Number

This macro specifies how long RelayFax will wait for the receiving fax machine to answer. This is a value in seconds.

RETRYATTEMPTS: Number

This macro specifies how many times RelayFax will retry a failed fax attempt.

RETRYDELAY: Number

This macro specifies the number of seconds RelayFax will wait between subsequent fax attempts.

NOCOVERPAGE: true

This macro will prevent RelayFax from generating a dynamic cover page and sending it along with your fax. This is useful for situations in which you either do not want a cover page or the first printed page of your document is the cover page for the fax.

BANNERTEXT: Text

This macro specifies the text that appears at the top of each faxed page. You can use the special banner characters here. See the Banner Text & Formatting Characters 42 for more information.

```
---Example Start---

From: Frank.Thomas@example.com
To: "555-1212, Eddie Filewood, "Forest Park Lanes, Front Desk""
<RelayFax@example.com>
Subject: My time.

FROMNAME: Frank Thomas
FROMCOMPANY: Forest Park Lanes, Inc.
```

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```
PRIORITY: 00
COMMENTS: Say, hit me in! I be in ina minute. %e Tell me I'm a lyin'. %
e Frank

---Example End---
```

15.2 Outbound Fax Rule Macros

The following macros can be used when specifying an email address in an Outbound Fax Rule:

All of these macros must be in upper case.

$RECIPIENTNAME$	This macro expands to the name of the fax recipient.
$RECIPIENTCOMPANY$	This macro expands to the company name of the fax recipient.
$FAXNUMBER$	This macro expands to the fax number the fax was sent to.
$FROMADDRESS$	This macro expands to the email address of the sender of the fax.
$FROMMAILBOX$	This macro expands to the mailbox of the fax sender. The mailbox is the part to the left of the @ sign in an email address.
$FROMDOMAIN$	This macro expands to the domain of the fax sender. This is the part of the email address to the right of the @ sign.
$SUBJECT$	This macro expands to the subject text of the email message.

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$MESSAGEID$	This macro expands to the message-id string of the email message.
$DATESTAMP$	This macro expands to the date stamp of the email message.
$HEADER:VALUE$	This macro expands to the value of the header specified to the right of the colon. For example, $HEADER:FROM$ would expand to the value of the email message's FROM: header.

Example:

```
$SENDERMAILBOX$@myfaxsend.com
```

See Also:

Outbound Fax Rules 86

15.3 DAT File Processing Macros

The following macros can be used within one or more of the RelayFax DAT Files 204. Some files can contain only certain macros. See RelayFax Data Files 204 for a list of the files in which these macros may be used.

$TRACKINGNUMBER$	Every fax is assigned a unique tracking number. This macro returns that value and is useful for matching a fax event with the log files.
$RECIPIENTNAME$	This macro expands to the name of the fax recipient.
$RECIPIENTCOMPANY$	This macro expands to the company name of the fax recipient.
$RECIPIENTFAX$	This macro expands to the fax number of the fax recipient.

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$FAXNUMBER$	This macro expands to the fax number to which the fax was sent.
DID	This macro expands to the DID number.
$FAXSUBJECT$	This macro expands to the subject of the fax.
$FROMLINE$ -or- $FROMADDRESS$	This macro expands to the email address of the sender of the fax.
$FROMNAME$	This macro expands to the name of the sender of the fax.
$FROMCOMPANY$	This macro expands to the name of the company that sent the fax.
$FROMFAX$	This macro expands to the fax number of the sender of the fax. (typically the RelayFax Server's fax number).
$FROMPHONE$	This macro expands to the telephone number of the sender of the fax. This macro corresponds to the voice number setting in RelayFax's template files.
$STREET1$	Expands to the sender's street address.
$STREET2$	Expands to the sender's secondary address, or second line of their street address.
$CITY$	Expands to the sender's city.

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$STATE$	This macro expands to the sender's state or province.
ZIP	Expands to the sender's zip or postal code.
$HOMEPHONE$	The sender's home telephone number.
$HOMEFAX$	The sender's home fax number.
$BUSPHONE$	Expands to the sender's business phone number.
$BUSFAX$	Sender's business fax number.
$BILLINGCODE$	This macro expands to the billing code of the sender.
$REPLYLINE$	When faxes are received and an email is generated to send the fax to its proper recipient(s) this macro will be used to generate the Reply-To header in that email. If the fax machine sending the fax transmits a fax ID to RelayFax then that fax ID will be used in the Reply-To field. This will allow the recipient of the fax to hit REPLY in their mail client and send the fax back to the person who originated it. If no fax ID is provided then this macro expands to a statement telling the recipient of the email not to generate replies. If the fax ID does not contain a fax number then a rule will have to be setup to make this feature work properly. This macro is valid in the NEWFAX.DAT and PARTFAX.DAT files only.
$LOCALID$	This macro expands to the fax machine ID of the local fax device

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	sending the fax.
$REMOTEID$	This macro expands to the fax machine ID of the remote fax device accepting the fax.
$REASONSTRING$	This macro expands to a text description detailing why a fax attempt failed. This macro is valid in the FAILURE.DAT file only.
$COVERPAGE$	This macro expands to the path name of the cover page used on the fax.
$BANNERTEXT$	This macro expands to the banner used on each fax page.
$COMMENTS$	This macro expands to the comments used on the cover page.
$SPEED$	This macro expands to the baud rate of the fax connection.
$PAGECOUNT$	This macro expands to the total number of pages in the fax.
$PAGESSENT$	This macro expands to the total number of pages actually faxed.
$RETRYCOUNT$	This macro expands to the number of attempts taken to deliver the fax.
$RESOLUTION$	This macro expands to 0 for low resolution or 1 for hi-resolution.
$FAXCLASS$	This macro expands to CLASS_1, CLASS_2, or CLASS_20

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$DURATION$	This macro expands to the number of seconds taken while sending or receiving the fax.
$PORT$	This macro expands to the port used to send the fax.
$SENDYEAR$	This macro expands to the year that the fax was sent or received.
$SENDMONTH$	This macro expands to the month that the fax was sent or received.
$SENDDAY$	This macro expands to the day that the fax was sent or received.
$SENDHOUR$	This macro expands to the hour that the fax was sent or received.
$SENDMINUTE$	This macro expands to the minute that the fax was sent or received.
$SENDSECOND$	This macro expands to the second that the fax was sent or received.
$TIMESTAMP$	This macro expands to a formatted string displaying the date and time the fax was sent or received.
$ATTACHFAXFILE$	This macro causes RelayFax to attach the fax image file to whatever message is being generated using this macro.
$ATTACHOCRFILE$	Attaches the OCR file corresponding to the fax.
$ATTACHMENT:path$	Attaches the file specified in the

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	path to a message.
$CURRENTVERSION$	Expands to RelayFax's current version number.
$YOURVERSION$	Expands to the version number of the user's RelayFax SMTP Client. NOTE: This macro can only be used in the UPDATE.DAT file.
$CLIENTINSTALL$	Expands to the name of the client install file (without path). This can be used to create a link to the install file in the update message.
$FAXFILE$	This macro expands to the name of the fax image file stored on disk.
$FAXFILENOPATH$	This macro expands to the name only of the fax image file stored on disk. The file path is not included.
$INCLUDEURL$	When this Macro is used in the NEWFAX.DAT or PARTFAX.DAT files, URLs will be included with messages that are built from these files that will make it possible for users to mark faxes originating from the same number as junk, prevent future faxes from being sent to them, and cause future faxes from the same source to be forwarded to an alternative email address.
$CNDDATA$	Returns all of the CND information provided to RelayFax by your fax modem. The "|" character is used in place of line breaks.
$CNDNAME$	Returns only the CND name element. This macro will only work properly when the CND name label

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	is properly configured within the Modem Properties dialog.
$CNDNUMBER$	Returns only the CND number element. This macro will only work properly when the CND number label is properly configured within the Modem Properties dialog.

See also:

RelayFax Data Files 204

15.4 RelayFax Data Files

The following files are used by the RelayFax Server to perform various functions that are described below. Other than ACCTINFO.DAT these files can be edited freely using a text editor and can be customized as required.

EmailSubject:	You can customize the email subject for the first four data files listed below: Failure.dat, Confirm.dat, NewFax.dat, and PartFax.dat. To use this feature add a line beginning with "EmailSubject:" to the top of the desired file. In addition to normal text, you can use the following DAT file processing macros in the EmailSubject line: $REMOTEID$, $CNDNUMBER$, $CNDNAME$, $PAGECOUNT$, $TRACKINGNUMBER$, $PORT$, $REASONSTRING$, $RECIPIENTNAME$, $RECIPIENTCOMPANY$, $FAXNUMBER$, $FROMNAME$, and $FROMCOMPANY$.
FAILURE.DAT	This file is returned to the sender of a fax whenever RelayFax has an error sending it. The "EmailSubject:" command may be used in this file. ANY DAT FILE PROCESSING MACRO.

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CONFIRM.DAT

This file is sent back to people who request a confirmation of their fax being sent.

The "EmailSubject:" command may be used in this file.

ANY DAT FILE PROCESSING MACRO.

NEWFAX.DAT

When an incoming fax is completely received it is sometimes folded into an email message and sent to one or more recipients. This file will be the body of that email message.

The "EmailSubject:" command may be used in this file.

The following macros are valid for this file:

$TRACKINGNUMBER$, $REMOTEID$, $SPEED$, $REPLYLINE$, $PAGECOUNT$, $RESOLUTION$, $PORT$, $SENDYEAR$, $SENDMONTH$, $SENDDAY$, $SENDHOUR$, $SENDMINUTE$, $SENDSECOND$, $TIMESTAMP$, $DURATION$, $FAXCLASS$, $ATTACHFAXFILE$, and $INCLUDEURL$.

PARTFAX.DAT

When an incoming fax is only partially received it is sometimes folded into an email message and sent to one or more recipients. This file will be the body of that email message.

The "EmailSubject:" command may be used in this file.

The following macros are valid for this file:

$TRACKINGNUMBER$, $REMOTEID$, $SPEED$, $REPLYLINE$, $PAGECOUNT$, $RESOLUTION$, $PORT$, $SENDYEAR$, $SENDMONTH$, $SENDDAY$, $SENDHOUR$, $SENDMINUTE$, $SENDSECOND$, $TIMESTAMP$, $DURATION$, $FAXCLASS$, $ATTACHFAXFILE$, and $INCLUDEURL$.

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UPDATE.DAT	This contents of this file will be emailed to users making client update requests, and to users sending messages from an outdated client, when RelayFax has been configured to send it. The following macros are valid for this file: $CURRENTVERSION$, $YOURVERSION$, $ATTACHMENT:path$, $CLIENTINSTALL$
POPHOSTS.DAT	This file lists the pop servers and login credentials of all the mail hosts RelayFax is configured to connect to and check for new mail to be faxed. NO MACROS ARE USED IN THIS FILE.
NOTO.DAT	If RelayFax is asked to fax a message but no fax number can be determined then this message will be emailed back to the person trying to send the fax. NO MACROS ARE USED IN THIS FILE.
NOCOVER.DAT	Returned when the prescribed cover page cannot be attached to the fax. NO MACROS ARE USED IN THIS FILE.
EXT.DAT	Lists the file extensions that RelayFax will attempt to convert and fax when they are attached to a message. NO MACROS ARE USED IN THIS FILE.
SMTPFAIL.DAT	This file will be sent when an email message cannot be delivered due to an SMTP failure. NO MACROS ARE USED IN THIS FILE.
NOACCESS.DAT	If RelayFax determines that the sender of a fax is not a licensed user then this message will be returned to them and

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their fax will not be sent.

NO MACROS ARE USED IN THIS FILE.

OUTRULES.DAT — This file lists the rules for processing outgoing faxes.

NO MACROS ARE USED IN THIS FILE.

INRULES.DAT — This file lists the rules for processing incoming faxes.

NO MACROS ARE USED IN THIS FILE.

FAXBOOK.DAT — This file lists fax contacts. This file can be shared amongst all network users.

NO MACROS ARE USED IN THIS FILE.

ACCT3X.DAT — This file lists the email address, real name, and fax password, of each RelayFax user account The entries within this file are stored in an encrypted format for security.

NO MACROS ARE USED IN THIS FILE.

UIDL.DAT — This file lists the UIDL values of messages stored on mail servers. This file is used to make sure RelayFax does not duplicate faxes.

NO MACROS ARE USED IN THIS FILE.

MSGID.DAT — This file lists the Message-ID values of messages stored on mail servers. This file is used to make sure RelayFax does not duplicate faxes.

NO MACROS ARE USED IN THIS FILE.

SCHEDULE.DAT — This file lists the times and scheduling settings RelayFax uses to determine when it should connect and collect mail to fax out.

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NO MACROS ARE USED IN THIS FILE.

See also:

DAT File Processing Macros 198

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Index

- A -

Access
  Network Printer 57
Account Address 134
Account Settings
  Accounts 112
  Options 114
Accounts
  Adding 112
  Address Listing 112
  Automatically creating 112
  Creating 112
  Importing from RelayFax 1.0 112
  Number Left 112
  Number Used 112
  Removing 112
  Settings 112
  User 112
ACCTINFO.DAT 204
Acquiring documents 150
Add Rule 21
Adding
  Accounts 112
  Document Types 62
  Mail Hosts 82
  Outbound Fax Rules 86
  Templates 118
Adding Modems Manually 24
Address 132
Address Book 110, 140
Address Express 110, 140
Address Listing 112
ADF 139
Advanced Options 154
Alt-N RelayFax Driver 156
Apply template to outbound fax 86
Archiving fax image files 65
Attach specific cover page 86
Attached Documents 153
Attaching Documents to Fax Messages 159
Attaching files to faxes 153
Attaching personal cover pages to faxes 145
Attachment
  Converting for faxing 62
  Email 62
  Faxing 62
  File Extensions 62
Attachment Files 71
Authorization Password 114
Automatic document feeder 139
Automatic Fax Exporting 65
Automatically Printing Faxes 84

- B -

Banner
  Characters 42
  Formatting Characters 42
  Special Characters 42
  String 41
  String Formatting Characters 41
  Text 41
  Text Characters 42
  Text Formatting Characters 41
  Text Special Characters 41
Banner Text 42, 76, 121, 164
billing 125
billing codes 125
BMP 71
Broadcast Fax 129
  Canceling 189
  Pausing 190
  Sending 167, 178
  Wizard 167, 178
Broadcast Faxes 172, 185
Brooktrout
  Installation 12, 24

- C -

Caller ID 80, 92
Calling Number Display 80, 92
Cantata
  Installation 12, 24
characters 41, 42, 164
Class 24
Client 132
  Address Book 140
  Attached Documents 153
  Attaching files to faxes 153

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Client 132
Attaching personal cover pages to faxes 145
Comments for cover page 142
Contact Manager 140
Cover Pages 145
Dialup Settings 135
Email 158
Fax Properties 142
Fax Specifics 142
Mail Server 134
Printer Driver 156
Properties 134, 142
Sending Faxes Programmatically 166
Server's domain name 134
Server's IP Address 134
Windows Address Book 140
Client Properties
Client Settings 137
Contact List 140
Dialup Settings 135
Personal Settings 132
Scanner Settings 139
Server Settings 134
Client Settings 137
Client Updates 46
CND 80
Labels 24
CND routing 92
Collecting mail for faxing 82
Comma Delimited Export Files 65
Comments 76
Comments for cover page 142
Company 121
Company Name 41
Compose Fax Dialog
Advanced Options 154
Attached Documents 153
Cover Pages 145
Error Message 142, 155
Properties 142
Scan Image 150
Scanning Options 151
Send Schedule 149
Summary 141
Composing a fax 129
Configuring Modems 24
Confirmation messages 154
Confirmation Requests 48
Connection Persistance 102, 135
Contact Manager 53, 110, 140
Contacts
Address Express 53
Default contact manager 53
WAB 53
Window Address Book 53
Converting email attachments for faxing 62
cost per fax 125
COV file 106
Cover Page 41, 121
Attaching Specific 86
Cover page comments 76
Cover Pages 145
Comments 106
COV file 106
Creating 106
Description 106
Editing 106
Editor 106
Existing Pages 106
Properties 106
Removing 106
Cover Pages tab (Client) 145
CPE file 106
Create Report 21
Creating
Accounts 112
Comma Delimited Export Files 65
Cover Pages 106
Templates 118
Creating and Editing Templates 118
Creating your Banner 42
CSID 24
CSID routing 92

- D -

DAT file processing macros 198
DAT Files 204
Data Files 204
Database Wizard 172, 185
Default
Fax Rules 84
Inbound Rules 84
Outbound Rules 84
Default Email Address 44
Definition of Formatting Characters 42

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Delete Fax 92
Delivery confirmation 154
Delivery Confirmation Requests 48
Dependencies 51
Detecting Modems 23
Device
  Dialing properties 36
Device Log 37
Dialing
  Prefix 36
  Pulse 36
  Rules 36
  Tone 36
Dialing properties 36
Dialup
  Attempts 102
  Closing sessions 102, 135
  Connection Persistance 102, 135
  Freeing ports for 102
  Hangup 102, 135
  Keeping sessions alive 102, 135
  Logon Name 102, 135
  Logon Password 102, 135
  Number of attempts 102, 135
  Profiles 102, 135
  RAS 102, 135
  Settings 102, 135
  Time to wait for a connection 102, 135
Dialup Settings 135
document feeder 139
Document Types 62
Driver 156

- E -

Editing
  Cover Pages 106
  Templates 118
Editing Faxes 157
Email Address 44
Email Client
  Sending faxes via 158
Email exported files to 65
Email Macros 159, 192
Email message to specific user(s) 86, 92
Enabling a modem to receive faxes 27
Enabling a modem to send faxes 27
Enabling RAS dialup/dialdown engine 102, 135
Enhanced Resolution 48
Error Message 142, 155
Error sending fax 142, 155
Event Log Window 20
Event Scheduler 98
Existing Cover Pages 106
Export 21
Export File Format 67
Exporting
  fax images to TIF files 65
  Faxes Automatically 65
Extracting Numbers from TO or SUBJECT 84

- F -

Fax
  Exporting 65
  Machine ID 41
  Number 41
  Server 41
  Server Properties 41
Fax Attachments 71
Fax Broadcast 129
  Canceling 189
  Pausing 190
Fax Broadcasting
  Sending 167, 178
  Wizard 167, 178
Fax Devices 23
fax device's ID string 92
Fax Exporting 65
Fax Images
  Removing from Disk 48
Fax Log Window 20
Fax Machine ID 121
Fax Messages
  Attaching Documents to 159
Fax Modem Settings 27
Fax number 132
Fax Properties 142
Fax Routing 80
Fax Rule Macros 197
Fax Template Properties 120, 123
Fax Templates 118, 123
  Banner Text 121
  Company 121
  Cover Page used in 121
  Description 120

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Fax Templates 118, 123
Dialing Options 123
Fax Machine ID 121
Fax Number 121
Name 120
Options 123
Port 123
Properties 120, 121, 123
Voice Number 121
Fax Viewer 157
Fax Window 20
FAXCLNT.EXE file 166
FAXCLNT.INI file 166
Faxes
Automatically Printing 84
Confirming delivery 154
Default Rules 84
Emailing to default user 84
Inbound Rules 92
Outbound Rules 86
Sending Programmatically 166
Faxing
Using a scanner 150
Faxing Attachments 62
Faxing Email Attachments 62
Faxing Rules 86
Faxing to a list 167, 178
FAXPARMS 166
Features 8
feeder 139
Files 204
Filtering 96
Format 71
Format for the export files 67
Formatting Characters 41, 42, 164

- G -

GIF 71
Group Templates 118
Groups 118

- H -

Hangup 102, 135
headers 76
HELO identification 44
Hiding SMTP Sessions 48
High Resolution 71
Honor Confirmation Requests 48

- I -

ID 41
Image Format 71
Imaging 71
Importing Accounts from RelayFax 1.0 112
Inbound Default Rules 84
Inbound Fax Rules 92
INIT 27
Installation 12
Introduction 8, 16, 128
ISP Account Information 102, 135

- J -

JPEG 71
JPG 71
Junk Faxes 96

- K -

Keywords 142

- L -

List of Formatting Characters 42
Log
Device 37
Modem 37
Log Window 20
Logging
Max Log Size 53
Options 53
POP Session Activity 53
Server 53
Settings 53
SMTP Session Activity 53

- M -

Machine ID 41
Macros

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Macros
DAT file processing 198
Email 159, 192
Outbound Fax Rule 197
Mail Hosts
Adding 82
Collecting from 82
Editing 82
enabling/disabling 82
Removing 82
Mail Server 44, 134
Mail Server Properties 44
Mail Sources
Adding 82
Collecting from 82
Editing 82
enabling/disabling 82
Removing 82
Mail Sources & Rules 80
Mail Sources and Rules 82
Managing contacts 53
Manual Add 24
MDaemon
Freeing port for 60
ini file 60
Server 60
Settings 60
Sharing ports with 60
Using RelayFax with 60
Menu 21
Menu Bar 17
Message
Error sending fax 142, 155
Modem 27
Dialing properties 36
Modem Class 24
Modem INIT String 27
Modem Initialization String 27
Modem Log 37
Modem Manual Add 19, 24
Modem Properties 19, 27
Modem RESET String 27
Modem Settings 27
Modems 23

- N -

Network Printer Access 57
New in RelayFax 8
Non-licensed users 114
Number Prefixes 48

- O -

OCR
Installation 12
OCR Options 73
OCR Printer Driver Options 137
OCR routing 92
ODBC Selector Wizard 172, 185
Options 114, 123
Dialing 48
Faxing 48
Miscellaneous 48
System Service 51
Outbound Default Rules 84
Outbound Fax 86
Apply template to 86
Rules 86
Outbound Fax Rule Macros 197
Overview 8, 16

- P -

Paper size 56
Paper source 56
Password
Authorization 114
PBX 32
Personal settings 132
Phone Numbers 41
POP3 Mail Hosts
Adding 82
Collecting from 82
Editing 82
Enabling/disabling 82
Removing 82
POP3 servers 82
Port 27
freeing for MDaemon 60
Sharing with MDaemon 60
TCP 44
Port Routing 92
Port Status
Current 27

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POSTDIAL.SEM file 60
Postmaster 114
PREDIAL.SEM file 60
Prefix 48
Print message to specific printer 92
Printer
  Access 57
  Domain 57
  Network Access 57
Printer Access 57
Printer Driver 156
Printer options 56
Printing
  Faxes Automatically 84
Printing Faxes 157
Printing Outbound Faxes 48
Processing mail immediately 98
Profiles
  Dialup 102, 135
Properties 21, 27
  Client 142
  Cover Page 106
  Fax Server 41
  Fax Templates 120, 121
  Logs 53
  Mail Server 44
  Options 48
  RelayFax 40
  Service 51
  Template 121
  Templates 120
Properties Dialog
  Client Settings 137
  Contact List 140
  Dialup Settings 135
  Personal Settings 132
  Scanner Settings 139
  Server Settings 134

- Q -

Quick-scan 139

- R -

RAS/DUN Dialup 102
Receiving Faxes 27
Recipient's Company 142
Recipient's Name 142
Re-Fax 21
Regular Expression Matching 73
RelayFax 8
RelayFax - Fax Server For Windows 16
RelayFax Data Files 204
RelayFax Driver 156
RelayFax Fax Viewer
  Editing faxes 157
  Printing faxes 157
  Viewing faxes 157
RelayFax Printer Driver 156
RelayFax Properties 40
RelayFax Settings 40
RelayFax SMTP Client 129
  Attached Documents 153
  Attaching files to faxes 153
  Attaching personal cover pages to faxes 145
  Comments for cover page 142
  Cover Pages 145
  Dialup Settings 135
  Fax Properties 142
  Fax Specifics 142
  Introduction 128
  Mail Server 134
  Overview 128
  Printer Driver 156
  Properties 134, 142
  Sending Faxes Programmatically 166
  Server's domain name 134
  Server's IP Address 134
Removing
  Accounts 112
  Cover Pages 106
  Document Types 62
  exported fax log entries 65
  Fax Images from Disk 48
  Mail Hosts 82
  Templates 118
Reports 56
Requirements 12
Rescan Ports 23
RESET 27
Retry Attempts 48
Return receipt 154
Routing 80
RTP 32

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Rules 96
Default 84
Inbound Default 84
Inbound Fax 92
Outbound Default 84
Outbound Fax 86
Running RelayFax as a Service 51

- S -

Saving settings 137
Scaling Images 71
Scan Image 150
Scanner Settings 139
Scanner support 77
Scanning 129
Scanning options
ADF 151
Document feeder 151
Resolution 151
Scanning Ports 23
Schedule 149
Scheduling 98
Security 114
Select All 21
Select Printer 48
Send fax
to numbers found in text file 86
to specific number 86
using a specific fax port 86
Send fax error message 142, 155
Send Schedule 149
Send To 21
Sending Faxes 27, 142
Sending Faxes Programmatically 166
Sending faxes via an email client 158
Sending to multiple users 167, 178
Sending Warning Messages 65
Server 134
MDaemon 60
Server Log 53
Service
Options 51
Settings 40
Logs 53
Mail Server 44
MDaemon 60
Options 48
Setup Menu 17
Sharing ports with MDaemon 60
Shortcut 21
Shortcut Menu
Add Rule 21
Client 129
Create Report 21
Delete 21
Export 21
Print 21
Properties 21
Re-Fax 21
Select All 21
Send To 21
View/Edit 21
Simple Scheduling 98
SIP Account 32
Skip next rule 86, 92
SMTP Client
Attached Documents 153
Attaching files to faxes 153
Attaching personal cover pages to faxes 145
Comments for cover page 142
Cover Pages 145
Dialup Settings 135
Fax Properties 142
Fax Specifics 142
Mail Server 134
Printer Driver 156
Properties 134, 142
Sending Faxes Programmatically 166
Server's domain name 134
Server's IP Address 134
SMTP Envelope ID 44
Source 150
SPAM 96
Special characters 41, 42, 164
Spooling Faxes to Printer 84
Spooling Incoming Faxes 44
Stop processing rules 86
Storing on disk 71
String 41
Modem INIT 27
Modem RESET 27
Summary 8, 16
System Requirements 12
System Service 51

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- T -

T.38 32
Template Description 120
Template Options 123
Template Properties 121, 123
Templates
  Banner Text 121
  Company 121
  Cover Page used in 121
  Creating 118
  Description 118, 120
  Dialing Options 123
  Editing 118
  Existing 118
  Fax 118
  Fax Machine ID 121
  Fax Number 121
  File 118
  Name 120
  Options 123
  Port 123
  Properties 120, 121, 123
  Removing 118
  Voice Number 121
Text options 76
Text to TIF conversion 76
TIF compression 76
TIFF 71
Timers 48
Tool Window 19
Toolbar 18
Tracking Number 20
Transmission reports 56
Tree 19
Twain 150
Twain support 77
Types 62

- U -

Unable to detect a modem 24
Updating the client 46, 129
User Accounts 112
User Address Listing 112
Using the RelayFax SMTP Client 129

- V -

View/Edit 21
Viewer
  Editing faxes 157
  Printing faxes 157
  Viewing faxes 157
Voice Number 41

- W -

Warning 142, 155
Warning Messages 65
Windows Address Book 110, 140

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